



Reflect, Resolve, Relax

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At the beginning of every year, we take time to reflect on the year past and make commitments to the fresh, new, and as yet unsullied, year. Typically, we limit our reflection to the 365 days just ended; often our resolutions are equally short term and quickly abandoned for the habits we have not figured out how to break. And once those resolutions are broken, stress, guilt, and chocolate consumption take over!

What to do? A little reflection may be a good place to start.

As 2018 wound down, our country shared a moment to remember and pay tribute to the 41st President of the United States, President George Herbert Walker Bush. There are few times when we pause as a nation and share a moment. Even fewer shared moments provide reflection and long-term perspective. The days leading up to the memorial services and the services themselves gave us all a history lesson not only of President Bush's 94 years of life, but also of the times and historical context within which he lived, loved and worked. The remembrances and eulogies were poignant, funny at times, and all shared common themes of family, friends, faith, and service to country. The recurrence of the themes in nearly every memory shows how deeply these pillars of President Bush's life were ingrained in all that he did and said during his life, and now continue as tenants of his legacy.

What was also remarkable about this moment and reflection was the span of generations — not only of President Bush's life, but also of those who gathered to remember, pay tribute, and honor him. Reflections and resolutions with a long time horizon help create and define a personal, familial, corporate, even governance, legacy. President

Bush reportedly hated the word legacy — in fact, he called it “the L-word.” The word certainly can signify something massive and great — and yet the reality is, it is also very local and personal. We all leave a legacy but rarely think about our life in those terms.

So, as we begin 2019, what if our reflection of the past and our future resolutions carried long time frames — generations — and not 365 days? What would change, how would

we see the past, and what transformation could we really make for the future?

These are not questions or perspectives that Greenleaf Trust ponders only at year end. We view the world this way consistently. Long generational time horizons are a critical part of how we work with clients.

The lens through which we work attempts to clearly view the past, while having a purposeful vision for the future. Client relationships with Greenleaf Trust usually start with a comprehensive plan that we create together. We seek to understand a client's core pillars — those things that rarely change and that drive

decisions and actions. The needs, goals and dreams for each pillar — family, friends, faith, business, community or others — are established. In this way, very early in our client relationships, we have insight into the client's core tenants as well as their goals and aspirations. Our objective with a comprehensive plan is to create a vision of the future using financial assets, risk management strategies and trust and estate planning opportunities as a means to support the client's desired outcomes.

As we implement wealth plans, working with Greenleaf Trust in the continuum of client care carries the trust

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advantage. The ability to change our service and legal capacity from advisor to trustee as client needs shift from growing wealth, to the phases of preserving and distributing wealth, allows for consistency of care and service. It allows us to continually execute a client's well-crafted vision that forms the foundation on which their financial legacy is built.

As we enter 2019 together and share the opportunity to continue to grow, learn, and serve, know that Greenleaf Trust takes a long term, generational, legacy worthy view. In choosing a partner and advisor with such a vision, your personal reflections and resolutions have already been established for the long term – so relax (and eat chocolate)! ☑