

Looking to the Future, Our New Year's Resolutions



By FuturePath Committee Member
[Rob McInerney](#), *Associate Director*

Happy New Year! Congratulations to all as we just emerged from a most trying year. We here at Pathstone and FuturePath hope you welcomed 2021 with both confidence and understanding. The confidence which arises in the knowledge of having survived 2020 has made you stronger and more formidable. And the understanding is from seeing the light at the end of the tunnel but knowing it will take fortitude to walk through the remainder of the journey to get there. And get there we shall.

As the tradition goes, January is a time to make resolutions and goals for the New Year. The FuturePath Committee has made resolutions to help us establish our priorities for 2021. **Our mission is to educate, coach, and facilitate the younger generation's continued creation and preservation of wealth through shared learning, interactive events, peer engagement, and a robust network of resources.** It is from our mission statement that we were able to select goals for this year. Although we can still expect to face many of the same challenges as we did in 2020, we are hopeful we can achieve much together.

1. Be Educators

Benjamin Franklin once quipped that "An investment in knowledge pays the best interest." The FuturePath Committee will curate content and webinars guided by this simple principle. **We understand the value of education and the joy of sharing it.** We will create content with that in mind.

2. Be Coaches

We have all needed encouragement these past months. The lucky among us have been blessed with good teachers or coaches to help us through the fog. Pathstone was created to assist people trying to navigate through the complex and intimidating prospect of family wealth. FuturePath was created to further that legacy by ensuring those who ascend to that incredible responsibility of continuing the family legacy, will do so with help and coaches who understand how to move forward with confidence.

3. Be Facilitators

There is an ancient proverb that goes "Tell me, I forget. Show me, I remember. Involve me, I understand." We at FuturePath want to facilitate the understanding encapsulated in this proverb. Specifically, we want to involve you more in your plans. To do this, we need to be better communicators to get to that place of understanding. Throughout the year, we would like to speak to you and hear from you more. **We will be looking for more opportunities to reach out to you and hear your ideas and how we can assist in making them a reality.**

There are our New Year's resolutions from FuturePath; to be educators, to be coaches, and to be facilitators. These goals are taken directly from our mission statement and, although not new, each reinforces the knowledge that our guiding principles remain strong. **FuturePath intends to be here for the next generation and to continue to pass on the tradition of being smart in a way that matters.** We look forward to the new year and to strengthening the promise of Pathstone. Be well.

Disclosure

This communication and its content are for informational and educational purposes only and should not be used as the basis for any investment decision. The information contained herein is based on publicly available sources believed to be reliable but is

not a representation, expressed or implied, as to its accuracy, completeness or correctness. No information available through this communication is intended or should be construed as any advice, recommendation or endorsement from us as to any legal, tax, investment or other matters, nor shall be considered a solicitation or offer to buy or sell any security, future, option or other financial instrument or to offer or provide any investment advice or service to any person in any jurisdiction. Nothing contained in this communication constitutes investment advice or offers any opinion with respect to the suitability of any security, and this communication has no regard to the specific investment objectives, financial situation and particular needs of any specific recipient. Past performance is no guarantee of future results. Additional information and disclosure on Pathstone is available via our Form ADV, Part 2A, which is available upon request or at www.adviserinfo.sec.gov.