

Jourdan:

My parents came to this country with nothing but a dream — to give their kids a better life.

They didn't grow up with wealth. They didn't talk about investments, or retirement. But they worked hard so I could have opportunities they never had. That shaped how I see planning. Planning creates opportunity. It helps the people you care about most. If I'm not taking about your family in our meetings, I haven't done my job.

I want you to feel comfortable enough to share the good and the bad. These aren't surface level conversations, they're life conversations. Every strategy would be rooted in your values. Every decision should reflect your purpose and your goals .

The real impact of that strategy happens in the transitions: changing jobs, having kids, retirement. It's in those moments that you need clarify and someone who understands your values and your "why".

My favorite type of client is someone who's invested. They're building something that's not just for them, but the people they love. When someone says, "Jourdan, I'm doing this for my family", I light up.