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MEANINGFUL RELATIONSHIPS

Written by David Ferrucci

Twenty-one years ago, Michele and I met friends – also clients of The Ferrucci Company – in Boston, and together we walked from the Public Garden to Fenway Park for a Red Sox game. At the time, Michele was pregnant with our first child, Maddie. Fast forward to this month... Michele and I met Debbi and Bill in Biddeford, Maine for another sporting event. This time, Maddie – now twenty-one! – was on the field playing goalie for Bowdoin College's field hockey team.

Debbi and Bill are among the first few clients I met when I started working alongside my father nearly thirty years ago. Now, whenever I have opportunities to talk about The Ferrucci Company with a prospective client, two questions arise:

Can we add value to your financial life? Determining this requires quantifiable answers to questions pertaining to cash flows, portfolio management, taxes, and other areas of personal finance.

The second question has to do with quality: **Is there an opportunity for a meaningful, long-lasting relationship?** I'll take a moment to parse this question, going backwards...

Relationship: when two parties engage, a relationship has been established; that's the word's definition in its base form.

Long-lasting: that means earning your trust and adding value to your financial life, continuously!

Meaningful: while we have not had the opportunity to cheer for the Red Sox and Bowdoin field hockey with all our clients, Paul, Frank, and I have developed and enjoy close friendships with every client.

Yes, we strive ongoing to add value to your financial life (question #1). Yet we also seek to build long-lasting, meaningful relationships (question #2); relationships that grow into long-lasting, meaningful *friendships*. For that, we are grateful!

The Ferrucci Company is a boutique firm to which families turn for financial guidance and leadership, freeing them to pursue their most important goals, while adhering to their values.

David Ferrucci: Over twenty-five years ago, David began helping individuals, couples, and families make balanced – and smart! – financial decisions. Earning Bachelor's and Master's degrees from Trinity College, he focused his studies within the field of behavioral finance; an academic discipline that factors human elements into traditional economic assumptions. David also earned a Master's degree from Columbia University, where he examined the complex relationship between personal finance and family dynamics. Currently, he is pursuing a Master of Philosophy degree through Wesleyan University, deepening his understanding of personal, family, community, and global matters as they relate to finances. Today, David's expertise lies in the macro-economic realm of coordinating, synchronizing, and advancing individual and family goals.

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Paul Ferrucci: Over twenty-five years ago, Paul began helping individuals, couples, and families make balanced – and smart! – financial decisions. Earning Bachelor's and Master's degrees from Trinity College, he focused his studies in the areas of financial economics, applied portfolio theory, and personal finance. Paul completed the University of Pennsylvania's Private Wealth Management Program at Wharton School, where he examined a rich assortment of personal and family case studies. Today, Paul's expertise lies in the micro-economic realm of portfolio management, cash flow management, and multi-generational asset transference; all with the aim of advancing individual and family goals.

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David Ferrucci and Paul Ferrucci are financial advisors located at The Ferrucci Company, 2 South Main Street, Essex, CT, 06426. They offer securities and advisory services as Investment Adviser Representatives of Commonwealth Financial Network®, Member FINRA/SIPC, a Registered Investment Adviser. © 2019 The Ferrucci Company 1-800-633-3051

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