

Our Approach to Working with Women in Transition

Transitions...including a change in jobs, divorce, the death of a spouse, an inheritance...
bring new responsibilities and questions.

At Fairport, our team commitment is to *listen, educate, and communicate* while
guiding clients during these challenging periods.

Fairport understands the unique needs of high net worth women who:

- value attention to the emotional aspects of their financial decisions and want to learn how to better prepare their entire family for the future;
- are well-educated, but not necessarily well-versed in financial planning;
- are active within their communities and often focused on a variety of philanthropic activities.

The Fairport Advantage:

Our professional advisors (which include CPAs, CFP[®] certificants and CFA charterholders) have experience working with high net worth women of all ages at every stage of life to coordinate and implement a financial as well as an estate plan that fits their distinct situation. Fairport has the capability to interface with other professionals on the client's behalf to deliver an integrated, focused experience.

Fairport is a leader in educating women about financial matters and continually connecting with them throughout the relationship. Our advisors understand how challenging these transitions can be from decades of working with female clients. We serve as advocates for the unique, integrated approach to life decisions that is common among our female clients.

The Fairport team is adept at providing strategies that are sensitive to the often overwhelming feelings and emotions experienced by women in transition. These strategies may include having a trusted friend attend meetings to help put the client at ease or creating a chart for the client outlining tasks and responsibilities of all involved parties.

Confident navigation for high net worth clients.