

# HIGH COUNTRY Business Review

EAGLE & SUMMIT COUNTIES' SOURCE FOR ALL THINGS BUSINESS

JANUARY 5, 2007, PG. 15

## It's in the Cards

Publication title: **It's in the Cards**

The holidays have commandeered my attention away from my regular investing column. As for many business owners, I am focused on a wide range of year-end tasks.

One of the most challenging for a financial advisor—particularly with affluent clients—is identifying an appropriate “thank you” gesture for the holidays. My clients don't *need* another material possession to be happy. And—as you can tell from my columns—I focus on their goals and objectives, truly caring about their lives well beyond their portfolio performance. Part of me asks, “Do I need to demonstrate appreciation beyond maintaining my integrity, working hard and charging a fair and reasonable fee?”

I decided, “Yes.” Year-end is a great time to genuinely and meaningfully express our gratitude for the profound trust our clients place in us—regardless of our business. So, with the remarkable assistance of my designer, we created from scratch a beautiful card, with a photograph she had taken of a snowbound cabin in Breckenridge. Inside, each client learns of their new subscription to Co-op America ([www.coopamerica.org](http://www.coopamerica.org)) and a Ski Green Pass ([www.skigreen.org](http://www.skigreen.org)), which offsets the carbon load they create by driving to the slopes. The package also includes a contribution to The Summit Foundation in their honor.

Creating this gift was fun and fulfilling; plus, it is a tangible expression of my relationships with my clients. Find a unique expression

### Summary: It's in the Cards

Expressing your appreciation creatively can be as rewarding for the giver as it is the receiver. This truth holds for personal as well as business involvement in your community. Finding expression that deeply reflects your values—“who you are”—is a goal worth spending some time on, at the holidays or anytime of year.



Steven R. Smith, JD, CFP® is the principal of RightPath Investments & Financial Planning, Inc., a “fee-only” Registered Investment Advisory firm in Frisco, Colorado. Steve may be contacted at 970-668-5525 or [steve@rightpathinvestments.com](mailto:steve@rightpathinvestments.com).

Specific firms mentioned are illustrations only and are not recommendations. Past performance does not guarantee future results.

This article was published by the *High Country Business Review*.

877.481.7110 • [www.rightpathinvestments.com](http://www.rightpathinvestments.com)  
Your Way to Prosperity

of your client relationships—it is a delightfully rewarding exercise.

To you, my readers, and the *High Country Business Review* for this extraordinary opportunity to release my inner columnist I wish “deep white snow, deep blue skies and deeper peace.”

Steve



Max B. Photography © 1996