

Scott Brooks Video Transcripts

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SCOTT: Let's say you hired me, okay? And we've put the plan together, and you guys have implemented the plan, everything's in place, we we're getting together with you, for instance, to deliver to you your personal financial literature, which has all, everything you want in there. Everything's all in place. We deliver this to you, okay? All right? And everything's done, everything's in place, you've got your personal financial inventory. Just before you leave my office you say the following to me; you say "Scott, we feel really good about this plan. We feel really good about what we've done here. This is really given us good peace of mind. Thank you." What's happened? What have we done that has been able to give you that peace of mind that you'd be able to say that to me? Roy, I'm going to start with you this time.

ROY: Well, I think you've put the plan together the plan on what our needs are, what we want our future to be like, knowing what requirements that we have to have.

SCOTT: And, specifically, those requirements, the big issue is, Patty gets taken care of?

ROY: Yeah. You know, and if something happens to me she'll be financially capable, or have the finances available to have somebody take care of her.

Hopefully not as good-looking at me, so . .

SCOTT: So, if something happens to you, Patty will still be able to be financially viable; be able to take care of her, or somebody could take care of her?

ROY: Right.

SCOTT: What else?

ROY: I think the fact that, as you said, sometimes, you know, you are available for us to call at any time. Any time we feel we have a question we want to ask about or talk about.

SCOTT: I think that goes back to the communication thing you mentioned earlier that was part of the dissatisfaction. Is that a fair statement?

ROY: Yeah, exactly. You know, once or twice a year may be sufficient, but, you know, as we get older, maybe we'll require more times to be able to talk to you. We've never been told to reevaluate our trust, you know. There could be things that need to be changed in there; we don't know. We've survived, we've lived on it for, what, the last nine years, was it 2000; yeah, I guess, nine years.

SCOTT: Twelve.

ROY: Twelve years! Math wasn't my strong point in school.

SCOTT: Yeah, very good. Anything else come to mind?

ROY: No, that pretty much covers it right now that I can think of at this point, you know.

SCOTT: That's fair; that's fair. Patty, what about you? What have we done to make you be able to say "We're really pleased, thank you." What have we done to make you be able to say that?

PATTY: Putting everything and organizing this personal financial inventory. I don't even think we could come up ourselves without the help of or the guidance with what you're providing for us, because we really don't have any idea where everything is. Well, I don't, anyway, so if it's all in one place, it's perfect.

SCOTT: Yeah, yeah. Okay, what else comes to mind?

PATTY: Just the fact that it's . . .

A. That it's all organized? What does that mean? What has happened that would make you say, here it is. But what's in there? what's in there that's important to you?

PATTY: All the financial information is in there; what is now, what will it be, and what could be.

SCOTT: Okay. What is important, what could be . . . okay, very good.
Anything else come to mind?

PATTY: No.

ROY: As a caveat to that, if I pass away before she does, the kids will be able to look at this, and be the ones . . .

PATTY: The children would know where to . . . at.

SCOTT: So the kids know what to do?

PATTY: What to do, uh-huh. It's just an added feature to our trust.

SCOTT: Talking about your living trust?

PATTY: Uh-huh.

SCOTT: Because that'll be separate from this, but they'll be integrated together.

PATTY: Right.

SCOTT: Okay, very good, very good. All right. Very nice