

## Scott Brooks Video Transcripts

### VIDEO 17: 2:16

SCOTT: If I could do one or two things for you like "I Dream of Jeannie" style, like this, you know if I could it -- and it's not win the lottery, okay -- if I could do one or two things for you that would be the most important things for you in this whole process to put this together for you, what would those one or two most important things be? Roy, I'm going to start with you

ROY: Well, whatever I say, it's going to sound kind of funny, but basically you're going to end up thinking for us. Based on what we've given you and the information we're giving you, it's going to take that conservative thought process away from me. You know what I mean? I don't have to worry if I know I can look in this book and say this is our plan, this is what's going, here's where we are. We know there's . . . we're going to be set up, that there's going to be a certain amount of risk no matter what we do, but it's not going to effect where we want to be when this whole journey is over with.

PATTY: We're relying on your expertise to guide us through this whole thing, since we don't know how to set up a plan of any sort.

ROY: But to take our . . . to take what we want and what we're looking for and mold that into something that we feel comfortable with.

SCOTT: To have a plan, to not worry about your finances, to not be concerned that risk is going to effect where you end up at the end of your journey, to have a reliable plan put together that you feel comfortable with. I mean, is that a reasonable summary of what you're looking for, capturing what you said? Is there more that I need to add after that, or does that seem like it's reasonable?

PATTY: That's pretty reasonable, I think.

SCOTT: Okay, very good. Wow, all right! Look, guys, you've got a lot of cool stuff you want to accomplish here. This is pretty neat! I mean, a lot of people just, you know, retire and watch Netflix until they die. That doesn't strike me as the two of you. You want to go do some stuff, all right? So, you have a purpose to life. So here's what I have to do: I have to put a plan together to accomplish all your goals, all right? I've got to make a plan accomplish those goals without exceeding your risk tolerance, and then all I got to do is make it last the rest of your life, all right? That's all I got to do, okay?