Collaborative Leadership - Wiser Together

Honoring the diverse perspectives that contribute to our wisdom as financial planners.

A multi-generational dialogue for our common good, our businesses, our clients, our selves and for our profession.

With Hannah Moore, Derek Lawson, Stephen O’Hara and Elizabeth Jetton
The Purpose of This Café

- Connect with each other in a meaningful way that encourages mutual mentoring and respect.
- Learn to listen better and to speak with more care.
- Build a new paradigm of learning together, with each other and from each other, to create a better future.
- Discover what is possible for our firms and profession by capitalizing on the strengths and wisdom of each generation.
- Support communication and advance the profession through a multi-generational lens.