On Actual Advice

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Certitude & Complacency by J. Overton Colton

Truxton is full of capable people with a variety of expertise and specialized skills. Tax strategy? Covered. Investment analysis and management—from equities to private deals? Covered. Creative banking solutions? Everyday. Capital advisory for business owners? Yes. Tax-efficient wealth transfer using trusts and other entities? We've got that too. The list goes on.

Truxton brings a range of capabilities and expertise to the table for our clients. But often real advising is not just about technical know-how. Advising is ultimately about sound judgment and the courage to offer it when it matters most. It requires quantifying the certainties, acknowledging the endless uncertainties, and making a judgement call in light of both. We challenge ourselves to be the firm that understands our clients' circumstances in detail, considers the quantitative and qualitative factors, and tells you what we think is best. Real advising can be affirming but sometimes uncomfortable. That's the job: to advise, not just agree or inform, but to guide clients towards good outcomes.

Building off the apt analogy used in an <u>earlier piece by Overton Colton</u>, advising is a bit like renovating a house. I want a contractor who consistently delivers quality and understands the vision. But when I am stuck making what feels like the millionth small-yet-impactful decision, what I really want is guidance. I don't need a menu of options—I want someone to tell me what they would do in my shoes, based on my goals and their expertise.

Reaching that state requires a relationship built on trust. Building genuine trust takes time, often forged during turbulence. Which is why Truxton is built with durability and longevity in mind. Bringing together talented, caring people who share a long-term vision can drive extraordinary client results. It takes time. It takes patience. And it takes a willingness and commitment to actually advise (and be advised). But when we reach that point with our clients, when trust in our judgement is needed most, the results speak for themselves.

If this mentality speaks to you, whether you are a family seeking thoughtful guidance or a professional drawn to Truxton's approach, we want to meet with you and begin building a relationship centered around actual advice.