

Title: What a Co Pilot Taught Me About You

There's a moment in flying when you hand the controls to someone else. Not because you can't keep going, but because someone else needs to take over while you rest, regroup, or simply aren't physically there. In aviation, we call that backup crew. In my office, that role is filled most of the time by Daniel Diego, who steps in when Daniel Ruez, our primary Registered Client Service Associate, is traveling or out of the office.

Recently, after interacting with several of you, Daniel Diego told me something I wasn't expecting. He spoke about the human quality with which you treated him. He felt delighted with what kind of people he can interact with, and that working with you, even briefly, left him with a genuine impression of warmth and respect.

That stopped me in my tracks. When flying by instruments, you sometimes can't see the terrain directly, but you trust what the signals tell you. Daniel's words were exactly that, a clear signal of something I already knew but was amazing that someone else confirmed from the outside. That the human quality of my clients isn't a coincidence or surface level courtesy. It's real, and it holds up even when I'm not there to see it.

It's been said that we must find time to stop and thank the people who make a difference in our lives. That line is attributed to John F. Kennedy, and today it feels truer than ever.

You make that difference. Not just in account numbers or the direction of a financial plan, but in how you treat the people who walk that path alongside you, even when that person isn't me, but someone briefly covering the control tower.

Thank you for reminding me, through someone else's eyes, of the human quality I have the privilege of sitting across from, or hearing on the phone, every time we speak. The backup support Daniel Diego provides when Daniel Rice or I are unavailable works so well not only because of Daniel's good work but also because you make it easy, with respect and warmth.

With genuine gratitude.