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FINANCIAL PROFILES **FINGER LAKES REGION**

Family-Focused Wealth Management

A multigenerational team of advisors at **The Labourdette Financial Group of Wells Fargo Advisors** provides seamless, coordinated financial services.

Taking a genuine interest in clients' values and ambitions before developing an investment plan is a hallmark of Ithaca-based The Labourdette Financial Group of Wells Fargo Advisors. Spearheaded by David Labourdette, AIF®, Branch Manager, Managing Director - Investments, and his two sons David, Labourdette, Jr., CRPC, Associate Vice President - Investments, and Kevin Labourdette, Financial Advisor, David Sr. was awarded the 2023 Wells Fargo Platinum Council, a premier designation that recognizes select advisors for their professionalism and exemplary commitment to clients.

Focusing on the specialized needs of high net worth families and institutions, The Labourdette Financial Group limits itself to a select clientele, giving staff the luxury of providing the highest level of attention and customized solutions. "People who have been accumulating wealth over many years have complex needs. Their personal wealth is often intertwined with their businesses. Simple cookie-cutter solutions will not work," says David, Sr., a financial advisor since 1994 with specialty training in pre- and post-retirement planning as well as issues related to asset management and estate planning.

Reviewing portfolios of affluent families, the Labourdettes note longtime investors may commonly find themselves owning outdated products and investments that might no longer serve them well. Some portions of the piecemeal plan may be duplicated, and important elements of a comprehensive wealth plan could be missing altogether.

"Our family office brings all the pieces of their financial puzzle together into one cohesive plan," says David, Jr.

FROM LEFT TO RIGHT: Kevin Labourdette, Financial Advsior; David Labourdette, AIF®, Branch Manager, Managing Director - Investments; and David Labourdette, Jr., CRPC, Associate Vice President - Investments.

Serving the Generations

As financial quarterbacks, the Labourdettes offer and help align all aspects of their clients' financial lives, including both corporate and personal assets. With decades of collective experience, and all the resources of Wells Fargo Advisors at their disposal, they provide financial services to executives and businesses, including stock-option exercise and sales programs, executive deferred compensation plans, and investment advice on proceeds from the sale of a business, retirement advisory services, and more.

The Labourdette Financial Group offers professionally managed money backed by world-class analytics and market intelligence, helping to create widely diversified portfolios that could include mutual funds, exchange-traded funds, and alternative non-correlated investing opportunities. Focusing on white-glove service for a select clientele, the team provides ongoing communication. They are a single resource for a wide range of investment planning services from retirement cash flow, estate, tax, and asset protection to business succession. The Labourdettes also support surviving spouses struggling to understand their own financial affairs and help second and third generations prepare to steward their legacy.

"Our clients appreciate that we're 100% committed to helping them and that we'll be here for their families and heirs in the decades ahead," says Kevin.

"We are extremely proud of the length and depth of our ongoing relationships. We feel honored that clients trust us to help them go through difficult transitions and make major decisions," adds David, Sr. "As their advocates, we aim to give our clients the confidence and freedom to enjoy the life they've worked for."

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