Bauman Scott

BESPOKE PORTFOLIOS

Helping Families Protect Their Wealth.

FAMILY WEALTH PLANNING

You've spent your lifetime building up your wealth, and know that one day your children will inherit what you've worked hard to accumulate. The issue is that 70% of family wealth is lost by the 2nd generation and 90% by the third.

YOUNG INVESTORS

We get it. Younger investors like you look for different things than your parents when doing business and buying products or services. We seeks to meet the needs of all investors through authentic connection.

CREATING CONVERSATION

Teaching your family to steward wealth well is key to avoiding loss over time. You can do this by having conversations about money habits and principles, giving your children the confidence to manage your assets well.

YOU'RE BOTH RIGHT

Listening to your parents isn't always fun - just ask my high-school boys. However, it's often that parents just want to share their wisdom with you. Listen, share, and be honest with your parents about your money ideas.

HOW I CAN HELP

Bringing your child or grandchild to a meeting with me brings a new dynamic to the money conversation. My goal isn't to provide investing tips, but show the value of working with a wealth advisor.

HOW I CAN HELP

Got questions about money, investments, or starting a business? I can help answer in a judgement free conversation. I also have a library of resources on popular topics like AI, student loans, investing, and more.

SET UP A FAMILY WEALTH CONVERSATION

(661) 302-4531