James Hunter on destigmatizing wealth management for our Baby Boomers

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“We are seeing an aging population. Around 40% of individuals over the age of 65 experience some sort of memory loss. So, it is going to become more of an issue especially where wealth management is concerned and the dynamics of the advisor-client relationship…”, States James Hunter, Head of Wealth Management at Echelon Wealth Partners Inc., in an interview with InvestorIntel’s Tracy Weslosky.

James went on to say that older adults should have a plan ready for any financial uncertainty and a good advisor can help with that. He said that Echelon advisors are equipped with this advice. They can give advice around seeking power of attorney and advice in terms of who to appoint as the power of attorney. Echelon can make sure that a client’s documents are in a centralized safe location that family members and trusted individuals are aware of where those documents are.

To access the complete interview, click here