

John Natale
Head of Tax, Retirement & Estate Planning

JOHN: I think it's like an onion, you pull back one layer and there's another layer. And the great thing about it is, every layer is of top-notch quality, and because I think we all care, we're all professionals, we hold each other accountable. Every day I come to work, it's something different. Things are always changing. The law, taxes, estate planning is very complicated, even for people like my team and I where we spend 24/7 on it. We take these complicated matters, communicate the message effectively in a very simple way for people to understand and for the advisor then to be able to retell that message to their client or use it for their client's benefit.

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