

## **A founder said something to us recently that stuck.**

He'd always managed his own investments, and done it well. But he told us he'd reached a point where he wanted to "graduate" from self-directed. Not because he couldn't do it anymore, but because his life was getting more complex: growing ventures, a growing family, bigger decisions ahead. He wanted his personal financials professionalized (his words) so his attention could go entirely to building and executing his vision.

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We think about that word "graduate" because it captures something most founders eventually feel. Doing it yourself makes sense at one stage. Then the stakes change.

Building a company asks a lot of you. Most of the founders we work with aren't avoiding their personal financial planning, they simply haven't had a spare hour in years.

The data backs this up. The Exit Planning Institute has found that 70-80% of a typical business owner's net worth is tied up in their company, while roughly half have done no formal planning at all.

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That's not a failure of discipline. It's the natural result of putting everything into the thing you're building. But it does mean that for most founders, the largest asset they'll ever own sits outside any real financial plan.

And waiting for the exit? That doesn't work either, because you know you are just going to do it again.

**You carry enough. Let us carry this part.**

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Financial planning and investment management designed around the realities of entrepreneurial business ownership. Tax efficiency at every stage, not just at exit. Wealth management and preservation that protects what you've built as life gets more complex and however the next chapter unfolds. Not just at exit, but now. We'll do the work when it matters most, not just when you've had a monetization event.

**This is the work we do at  
PUREfi Wealth.**

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— WEALTH —

## About PUREfi Wealth

Headquartered in Boston, PUREfi Wealth is an independent wealth advisory boutique. The firm is deeply committed to providing comprehensive, multi-generational advice, wealth planning, and investment management to individuals, families, and their associated entities, and operating under a fiercely independent and objective fiduciary standard through a state-of-the-art open architecture investment and technology platform.

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