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BARRETT ASSET MANAGEMENT JOINS PANEL AT RIA SUMMIT

Graeme Campbell and peers discussed how to avoid asset base loss from generational wealth transfer

February 19, 2019—New York, NY—Barrett Asset Management, LLC, joined other leading independent registered investment advisor (RIA) firms at the 2019 New York RIA Summit to discuss the evolving wealth and investment management industry landscape. Graeme Campbell, CFP®, Managing Director, Barrett Asset Management, participated on a panel that explored, “What does the next generation want? Avoiding asset base loss with generational wealth transfer.” The well-attended, all-day event was held in midtown Manhattan and was organized by IC Summits.

Graeme said, “Events like this, that bring together a diverse group of professionals, perspectives and insights, is so critically important. Not just to the professionals within our industry, but to the end-clients we each serve, as the ideas discussed here ultimately focus on how to deliver better solutions to the families we work with.”

The four-member panel, moderated by Randy Kaufman, Senior Vice President, EMM Wealth, considered how advisors and the families they serve can benefit from deeper communication in support of stronger relationships across generations. As the Baby Boomer generation prepares to transfer approximately \$68 trillion to their children over the coming years, it is important to note that industry research indicates parents are often more concerned with the transfer of their values to the next generation than their wealth. And related data indicates that parents are desirous of advisors speaking with their children about issues related—both directly and indirectly—to wealth and, more broadly, finances.

About Barrett Asset Management

Since 1937, Barrett has been putting its clients first—working to help each of them achieve their goals and aspirations. Barrett is an independent investment management firm focused on the growth and preservation of wealth for individuals, families, trusts and non-profit institutions. The firm tailors each investment portfolio based on a client’s objectives for income and growth through suitable asset allocation and individual investment selections. To learn more about Barrett, please visit <http://www.barrettasset.com>.