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Timothy was a new client who arrived here upon receiving a severance package from his company several years ago. He had worked for the same company for over 30 years and it was the only place he ever worked. When he engaged us, he was concerned about the type of lifestyle he could sustain. He wanted to know if he needed to find work where he would have to endure the same hours and stress that he had been experiencing, or whether he could afford to work part time, or as a consultant, or even if he could spend his time focusing on philanthropy. We were able to construct a [Family Financial Model](#) to quantify the amount of flexibility he had in his spending ability, and under what employment circumstances they would apply. Based on our analysis, we determined that he did not need to work at all to sustain his lifestyle, much to his surprise and relief. He was able to use his new-found financial freedom spending time with his family and auditing courses at a nearby university.

Important Disclosure:

RegentAtlantic Capital does not provide legal, tax, or accounting advice; this case study reflects our own understanding of current tax law. To the extent that a reader has any questions regarding the applicability of any specific issue discussed above to his individual situation, he is encouraged to consult with the professional advisor of his choosing. Moreover, you should not assume that any discussion or information contained in this presentation serves as the receipt of, or as a substitute for, personalized investment advice from RegentAtlantic Capital.

Please note that the case study above was selected to demonstrate the type of analysis that we would traditionally perform for our clients. The selection was not based on any portfolio performance criteria. Additionally the client is not endorsing our services and may or may not have a positive experience with our firm.