

# PROFILES IN WEALTH MANAGEMENT: A Q&A WITH SOME OF THE INDUSTRY'S LEADERS



O'Dell

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Cynthia O'Dell practices law in Charleston, South Carolina. She devotes her practice to meeting the estate planning and elder law needs of her clients. The firm provides the following estate planning and related legal services to client of all ages: Probate Administration; Wills, Trusts, Power of Attorney; Asset Protection; and Guardianship and Conservatorship.

**SWMB:** How do you best serve your estate planning clients?

**O'Dell:** Just as in life, first impressions are critical. First find a way to connect, and then listen. The nature of estate planning is a very private and personal matter for people. They will not share the important issues in their lives until they are comfortable and can trust me. It is my job to make that happen. Estate planning is not about me. It's about my client. It is only after a client has been given the opportunity to tell me what is important, that she also appreciates that I need that information to do the best estate plan for them.

Inevitably, whenever I think I know what a client needs or try to rush this initial process, the client forgets to tell me an important fact or tells me much later in the planning process. Adhering to this philosophy has saved me time in the overall planning process. It is always time well spent.

**SWMB:** Over the years, what was your single greatest client challenge and how did you overcome the challenge?

**O'Dell:** My single greatest client challenge is the same challenge I face in everyday life: patience. I work to overcome this challenge by focusing

on the task at hand and being in the moment. I always try to remember that what is an everyday topic for me is a new and sometimes difficult topic for my clients.

**SWMB:** What was your most unusual client request?

**O'Dell:** For more than 1 year, I was representing an elderly gentleman in a guardianship matter against his daughter. In other words, the daughter was trying to have her father declared incompetent. She went through four lawyers and ultimately failed. When her father passed, she retained me to represent her in the probate matter! That is one of my most recent unusual requests.

**SWMB:** What aspect of your profession gives you the most satisfaction?

**O'Dell:** Reducing the very difficult issues of disability, death and taxes to a manageable plan that gives the client control and peace of mind. It is when the client smiles and gives me a heartfelt thank you that I am most satisfied.

**SWMB:** What keeps you awake at night?

**O'Dell:** I tend to go go go during the day, too often without reflection. It is at night that I can reflect, and am most concerned and troubled about our current place and role in the Middle East and, in turn, the world. This, in turn, leads to reflection on what is my role and place in this world. Am I using the gifts that I have been given in the best way? What is my purpose in this world? Am I contributing? How do I give back?

**SWMB:** If you yourself had unlimited funds, what would you do with them?

**O'Dell:** If I did not have any financial limitations, for starters, I would work very closely with the Central Asia Institute to promote their collaborative efforts in local communities throughout remote villages of northern Pakistan and Afghanistan to provide community based education and literacy programs. With their guidance, I would fund their community-based projects. The book "Three Cups of Tea" by Greg Mortenson is a tribute to what one person can do — with and without financial means. Once that project was established, I would establish and fund a project to educate all Americans.

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