

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



Desimone

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**C**hristopher Desimone is the managing partner of Anderson, Desimone & Green, PC, an estate planning law firm with offices in Roanoke, Blacksburg and Smith Mountain Lake in southwest Virginia. He devotes 100 percent of his law practice to estate planning, estate and trust administration, and elder law. Desimone is a member of Wealth-Counsel, a national organization of estate attorneys that develops state-of-the-art planning techniques.

**SWMB:** What is your overall estate planning philosophy?

**Desimone:** I believe in a comprehensive, client-centered approach to estate planning. A person's philosophy, however, is invariably traced to their own personal experiences and it helps immensely if you are genuinely passionate about what you do in life. For example, one couple in their late forties attempted to conduct some estate planning with an attorney that did not regularly handle that area of the law. They thought they had done the right thing for their family. The husband subsequently died after suffering a heart attack. Six months later, after a bout with cancer, his wife died leaving four children, the youngest being fourteen years old. Their improper estate plan and a not-so-trustworthy trustee resulted in nearly fifteen years within the court system, causing incalculable financial and emotional hardship on their family. Certainly not what the parents intended. The bright side to that story is that the youngest child grew up to become an estate lawyer in Roanoke, Virginia, passionate about conducting proper estate planning and devoted to ensuring that this doesn't happen to other families. My estate planning philosophy is a simple one: exercise

the care and diligence for each client's estate plan as you would for your own family.

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

**Desimone:** Without question, my greatest single challenge was to learn how to shut up and listen. Like many lawyers, I assumed that displaying a high level of substantive proficiency in my area of the law would be impressive to clients. Nothing could be further from the truth. Instead, the great challenge for any lawyer is to learn how to listen to your clients. You must not only listen to what they are saying, but also listen to what they are not saying. The very first question I now ask every prospective client is "tell me what is important to you?" I then listen carefully. With the right questions, the conversation steers itself toward their hopes, dreams, fears and visions for their future. Without knowing it, they begin to verbally draft their estate plan, and chart the course to accomplish their objectives.

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

**Desimone:** A childless couple came to me and declared that after they were gone they wanted to protect their beloved horses. And they had \$10 million to do so. As it turns out, our state's law was about to change so that the money could be bequeathed after the death of the clients in such a way as to provide directly for the horses for the duration of their lifetimes. We carefully structured an entire estate plan evolving around the care and support for these animals and signed the legal documents the same week that the new law was enacted. Not only did I become one of the first attorneys to implement a formal "pet trust" under our new state statute, but also more importantly I was reminded that estate plans are always as unique as the people who create them.

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

**Desimone:** The partnership I have with my clients. Their goals are my goals and if we all do our part, the primary mission of achieving those goals is the inevitable result of our rela-

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tionship. For example, a wonderful client of mine recently passed away. We had prepared and implemented a suitable estate plan for him that made for an easy, smooth transition upon his death. After he died, his son came to my office to sit and talk, and I explained how everything would work. I described how his father had created a unique plan that would pass the assets to the son while minimizing any headache, hassle, taxes and fees, and how the inheritance was protected from divorce, lawsuits, creditors, predators, in-laws and outlaws. At the end of meeting, the son thanked me for all that I had done for him. But I told him the truth: it wasn't about me. His father had thought enough of his son to do this for him. And the most satisfaction came when he stood in the doorway on his way out of the office as he looked at me and remarked "you know, this was a greater gift from my father than all the others combined". If you want satisfaction from your clients and their families, structure your approach as if you are a partner with them in their journey to accomplish their goals.

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

**Desimone:** I feel compelled to defer this answer to my wife, who confirms that I "sleep like a baby."

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

**Desimone:** I would focus on giving funds to those religious and charitable organizations that emphasize systemic changes in order to help others. I would establish a foundation for those in our community with special needs.

I have devoted a large portion of my law practice to serving families that have loved ones with disabilities, and I believe we can help those with disabilities properly plan for their future. Next, as a board member of a local youth organization, I would support those groups that focus on structural changes favoring our youth. As a former Officer in the U.S. Army, I am grateful to my fellow soldiers who are fighting for our country, and I would help various veterans groups in achieving their goals. Lastly, as an outdoorsman and father of four children, I would help organizations that provide good stewardship in preserving our natural environment.

**HAVE AN IDEA FOR AN  
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