

In honor of Mother's Day, we've put together a round-up of the best pieces of financial advice that our advisors received from Mom growing up. They've instilled the importance of saving, giving to charity, and more.

Happy Mother's Day!

My mother is very generous and charitable (she learned from her mother), and I can always remember that after every windfall – a gift, inheritance, etc., – she immediately gave away a portion of it to a charity. It taught me to pass along my good fortune to others.

**Bill Engel**  
Senior Vice President and Financial Consultant



My immigrant mother, who spoke very little English, would always say, "Save the 'Georgie,'" which meant when you earn a dollar (George Washington on the bill), hold on to it and save it, because you will need it for the future.

**Santo Liberto**  
Financial Consultant



My mom always said "If you make a dollar, make sure you save 95 cents." I did that as a kid and had a fat piggy bank.

**Michael Blehar**  
Managing Director and Principal Financial Advisor



By my mother's example, I learned that money is not the key to happiness. Once you have the basics taken care of, how you treat others is more important than how much money you have in the bank.

**Travis Sollinger**  
Director of Financial Planning



Two pieces of advice from my mother include not being so thrifty that it takes the joy out of life. Small indulgences are a part of life's pleasures. She also taught me to practice patience on larger expenditures. Often times you'll realize that you don't really need it.

**Katharine Perry**  
Associate Financial Consultant



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