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PARCION
PRIVATE WEALTH

Parcion Private Wealth launches original podcast for business owners and entrepreneurs exploring what's next

"What's Next? Optimizing Personal Wealth Through a Business Sale and Beyond" breaks down the complexities of navigating wealth events

SEATTLE, Aug. 27 2021 – Parcion Private Wealth, a Seattle-area wealth management firm focused on helping business owners and entrepreneurs manage wealth events, recently launched an original podcast to explore the many facets of business ownership, including planning for a sale.

In each episode, host Terry Cook, CFP®, CIMA®, Parcion Private Wealth managing principal, interviews an expert from Parcion's virtual family office network, ranging from accountants and estate planners to investment bankers and tax attorneys – many of whom are entrepreneurs, as well.

"Our approach is to assemble a team of professionals, both within and outside of our firm, who bring specific expertise for each client we serve," Cook said. "Our new podcast provides listeners with an inside view of our firm's collaborative structure, while offering resources that support business owners and their families, or anyone else planning for a major wealth event."

In the first and second episodes, Cook is joined by Greg Porter of Bertnston Porter & Company and Peter Ciganik of GTIS Partners, respectively, to talk about Opportunity Zone investments, a tax mitigation strategy that enables investors to support distressed communities. In episode three, Michael Butler of Cascadia Capital discusses the nuances of planning for a merger or acquisition, followed by Kendall Anderegg of Mutual Materials who talks about how gender affects the workplace in episode four.

Parcion Private Wealth generally begins working with business owners and entrepreneurs two to three years before a wealth event. As an independent firm with a distinctive entrepreneurial mindset, Parcion's role is to advocate for clients – not only to optimize a business sale, but also to support individuals and families as they map their next stage of life.

"One of my primary goals when founding Parcion Private Wealth was to establish a model of client service that enables our team to act as a true partner to our clients," Cook continued. "Part of our responsibility as a partner involves sharing resources and insights, beyond offering financial strategy and guidance. I'm excited to see how the podcast evolves as a useful tool for the community at large, in addition to the clients we serve directly."

Episodes of "What's Next?" are published monthly and are available to stream directly on www.parcionpw.com/podcasts or via Apple Podcasts, Stitcher, TuneIn, Spotify or Google Podcasts. Find more resources at www.parcionpw.com.

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About Parcion Private Wealth
Parcion Private Wealth is an independent multi-family office that partners with entrepreneurs, business owners and their families to optimize wealth events and beyond through smart planning, strong advocacy and prudent investment management. Parcion's experienced team helps clients preserve the legacy they've built to support their families and communities. Learn more at www.parcionpw.com.

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