



Lucien, Stirling & Gray Advisors Share Questions for Thoughtful Conversations About Life and Money in Year-End Series

AUSTIN, Texas (November 23, 2010) – Faced with holiday spending, charitable giving and year-end financial planning decisions, many people discover that the end of the year puts money matters front and center, says Thomas Twombly, president and co-founder of Lucien, Stirling & Gray Advisory Group. To help people understand their choices, Lucien, Stirling & Gray is publishing a series of essays on money matters using thoughtful questions that clarify values and attitudes toward our money and time.

“We all face numerous financial decisions, both big and small, in the last quarter of the year,” says Twombly, who co-founded Lucien, Stirling & Gray Advisory Group, Inc., an independent, Austin-owned wealth management firm, in 1992. “We are selecting charities to support, contemplating meaningful gifts for family and friends, and evaluating our investments. It’s a natural time to think about the year ahead and how we might do things differently or better in the coming year. Asking the right questions is a great place to start.”

Twombly and his team of five wealth managers, all of whom earned the prestigious FIVE STAR Wealth ManagerSM Award for client satisfaction in 2010, selected a series of topics tackling life and money to encourage conversations among spouses, partners and families. Between November 23 and January 15, the advisors will take turns sharing their opinions on matters including:

Purpose of Money: Thomas Twombly shares his [favorite thought-provoking questions](#) that uncover the true purpose of our money and resources at any age

Spending and Saving: Advisor Megan Poore shares ways that families can reduce holiday stress and control spending while still [enjoying the gift-giving and sharing spirit of the season.](#)

Giving: Time and money are two of our most valuable assets. How do we decide where to spend them? Advisor Cass Grange gives examples of how individuals and families can develop their personal giving plans.

Learning: From 401K statements and mortgage documents to insurance policies and settlement agreements, the paperwork about our financial lives can be mystifying. Bleckley Dobbs, CFP, demystifies the paper trail for greater peace of mind.

Planning: Advisor Mark Ward, CFP, ChFC identifies the most pressing financial matters at every life stage related to retirement planning, estate planning, and insurance

Enjoying: In life transitions, we often want to maximize our enjoyment and minimize our stress. Whether that's retirement, a career change, or a traumatic event such as a death in the family, our approach toward stewarding our resources can be the foundation for our well being. Advisor Glenda Summers, CFP® shares advice on stewarding our time and money at work and at home to maximize our enjoyment.

"These are conversations that we continuously have with each other, our clients and our own families," says Twombly. "Come January 2011, we hope that more people will understand the value of these conversations and how they bring peace of mind in a season of celebration and sharing."

About Lucien, Stirling & Gray Advisory Group, Inc.

Lucien, Stirling & Gray Advisory Group, Inc. is an independent, fee-only wealth management firm offering comprehensive, individualized wealth management solutions to individuals, corporations, trusts, and foundations. Founded in 1992, the firm is a Registered Investment Advisor, and provides fiduciary-level asset-management, advice, and planning services to clients in the central Texas area. In 2010, Lucien, Stirling & Gray was named one of Austin's "Best Places to Work" by the *Austin Business Journal*. For more information, please visit www.lsggroup.com.

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