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Philadelphia Financial

Serving Experience and Wisdom

Meanix Robustelli Wealth Management Group of Northwestern Mutual designs financial plans to help generations of clients preserve wealth.

Conventional wisdom says that heads of households should organize their estates at the earliest opportunity as a way to prepare for unexpected events and secure family wealth.

But what about the next generation? Are they prepared to inherit the family estate? What do they know about tax burdens, investments, and fiduciary responsibilities?

James H. Meanix | Michael S. Robustelli

Wealth management advisors James H. Meanix, CFP®, CLU®, ChFC®, AEP®, CASL®, CAP®, and Michael S. Robustelli, ChFC®, CASL®, CLU®, think a lot about these questions. The leaders of Meanix Robustelli Wealth Management Group of Northwestern Mutual, they design comprehensive financial plans for high net worth and affluent families—as well as corporations, foundations, and trusts—while offering guidance and education at every stage of the relationship. "The depth and breadth of our experience is exceptional," says Meanix. "We're helping to change people's lives, and that's why our clients stay with us."

Serving All Generations

At Meanix Robustelli, it starts with a plan. "We ask a lot of deep questions," says Meanix. "That creates connection and the sharing of vulnerabilities." Integral to that process is extensive client education around estate planning, taxes, insurance, and investments. With a combined 50 years of experience between them, Meanix and Robustelli have witnessed just about every life and economic scenario out there. These insights serve to strengthen clients' financial plans, which the team reviews annually to see if and how clients' goals have changed, and whether the plan remains relevant.

The structure of Meanix Robustelli is itself an example of strategic planning. With an age gap of 20 years between Meanix and Robustelli, that generational spread means the firm is prepared to care for clients well into the future. "Nobody wants to end a relationship with a financial advisor," says Meanix. "Our clients know they'll be taken care of for the next 20 to 30 years by an intact team experienced in legacy planning."

Both Meanix and Robustelli nurture relationships established by the firm decades ago while also engaging clients' children and grandchildren in fiduciary fundamentals. "I tell them, 'We've been coaching your family for years, and now we want to coach you,'" says Robustelli. "We'll go over things they don't have to worry about for five or even 20 years. Building their knowledge base will put them ahead of the game." Robustelli offers sage advice for younger clients enticed by the idea of solo investing: "You can read about robo advisors and no-fee investing, but go that route and there's no one to teach you about risk management," he warns them.

In an industry that often prioritizes investments over the financial plans that underpin them, Meanix and Robustelli stand apart. They bring experience and wisdom as well as personal motivations for helping clients: Both men have seen the lives of loved ones upended by poor financial planning. Today, they're dedicated to helping clients avoid that fate. "Seeing firsthand how a good, solid financial plan can help people during difficult times is what I think about every time I'm creating a plan," says Robustelli.

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