

PORTSMOUTH

CITY LIFESTYLE™

The
Investing
Issue

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inside *the issue*

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A photograph of a white lighthouse with a red lantern room, situated on a rocky pier. The scene is captured at sunset, with the sky in shades of orange and yellow. The lighthouse is reflected in the calm water in the foreground. A city skyline is visible in the background to the left. The title 'GUIDANCE THAT GROWS WITH YOU' is written in a large, white, serif font, arched over the lighthouse.

GUIDANCE THAT GROWS WITH YOU

ART MECONI AND TEAM MAKE
THE IMPOSSIBLE POSSIBLE

ARTICLE BY ANN KATHRYN KELLY

“I tell my clients: Be like a racehorse, keep the finish line in sight and your blinders on to deter distraction.”



What do horse racing and financial planning have in common? More than you think, and it's not tied to a betting window!

In a recent conversation with private wealth advisor Art Meconi, CRPC®, CDFA®, APMA®, he framed a racetrack analogy that resonated with this writer: “When it comes to following a financial plan, I tell my clients: Be like a racehorse, keep the finish line in sight and your blinders on to deter distraction.” Often, clients wrestle with competing advice from well-meaning friends and family members sharing their own experiences. The problem is that they are rarely certified financial advisors and are not familiar with all of the details or personal goals of the client—nor should they. That’s Art’s job and one he is passionate about. He knows how to help clients realize their financial goals and achieve wealth independence.

Art operates Meconi Financial Management & Advisory, a private wealth advisory practice of Ameriprise Financial, LLC. Art and his four-person team serve clients on the seacoast and beyond. It’s a 110-percent effort from his small but

mighty team that has built this successful high-touch advisory, guiding clients through a range of life events—planned or, as sometimes happens, unplanned. The team partners with a network of estate planning, tax, legal, real estate, and banking professionals to extend their expertise and offer clients a holistic approach.

“I vet each partner to ensure a seamless client experience,” Art says, “because I’m promising these services come with the same level of responsiveness they expect from my practice.”

Collectively, Art’s team and network turn the impossible into possible. He gives the example of working with a trusted mortgage lender recently to help a client purchase an investment condo in a different state under a tight timeline. The client’s college-aged son needed off-campus housing and was scrambling. The approach to buying instead of renting solved two issues: the son now has reliable off-campus housing without paying high rent, and the client gets a revenue stream from an extra bedroom, plus building equity.

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Partnership Approach

By partnering with a deep bench of experienced professionals, from estate planning attorneys to realtors, mortgage lenders, title companies, insurance providers, and more, the Meconi team can offer holistic guidance tailored to each client's goals that can pivot around changing life events.

Proactive Communications

Art takes a proactive approach when working with clients and families. Keep these four questions top of mind with every conversation.

1. What are your most critical financial goals right now?
2. What are you looking to achieve long-term?
3. What concerns you most about your finances?
4. How are your investments performing in the current market?

Get in Touch

155 Fleet St., Suite 212
Portsmouth, NH
603.232.8266
meconifinancial.com

Art points to another client he met almost 20 years ago who expressed his concerns about keeping his most treasured asset, a family home on the Maine coast, due to the high taxes on top of heading into the 2008 recession. Art worked with him to put the property at the center of their financial plan, with recommendations and checkpoints around budgeting, investments, and timelines. To borrow the horse blinders analogy, the client kept his sights on the finish line, trusting Art's guidance. More than 15 years later, the beloved property is still in the family, and they've partnered with an estate planning attorney to keep it that way.

Art reminds us that while finance can intimidate, it doesn't need to—with the right plan in place. Preparation, agreement on goals, and receptiveness to guidance are vital in driving results. "I'm here to help clients feel confident, comfortable, and in control of their financial lives today and in the future."