

# Client and Professional Advisor Comments

"Passing on a family business is almost more about family dynamics than economic solutions. Don's insight into the former and expertise in the latter helped us successfully navigate a first to second generation business transition. We are now poised to pass our business to a third generation. It's nice to work with someone who has successfully helped hundreds of families through the process."

**Bob Foster**  
Retired President  
*Lost Valley Ranch*  
Sedalia, CO

"Don carefully listened to our goals and assisted us to put a plan in place, avoiding pitfalls we didn't even know were there. In the process we gained tremendous respect for Don for understanding the business and tax principles which are at work. He is a true professional!"

**Randy Geving**  
Vice President  
*Six and Geving Insurance, Inc.*  
Colorado Springs, CO

"Don invested the time to listen and understand my complex needs, then provided creative solutions that are performing beyond the projections. True for me personally. True for our organization – as Don has structured all of our "key man" programs. I appreciate the reliable expertise and impeccable integrity. Don is personable, yet very professional."

**Bill Anderson**  
Retired President & CEO  
*Christian Booksellers Association*  
Colorado Springs, CO

"The proof is in the results. Twenty years ago Don See and Dave Keesling assisted in crafting the estate planning for my parents. Last year after mom's death (and dad's several years before), we realized that the planning that was set into motion years before provided a seamless transition, consistent with their wishes and taxless. Charity and members of the family were greatly appreciative of that advance planning when they were able to have set it into motion. Once again, many thanks!"

**John Gibson**  
Real Estate Developer  
San Diego, CA

"I have enjoyed working with Don in connection with the estate plans of mutual clients. His approach is personable, knowledgeable and professional, and clients respond favorably to those important qualities."

**Kenneth P. Keene, Esq.**  
*Keene & Sparks LLP*  
Colorado Springs, CO

"I feel blessed to have Don See as my professional business and insurance advisor. I first met Don when I was a young man and new to the world of business. He arranged for my personal family and professional planning needs. Now 10 years later, I feel I have an advocate and friend looking out for the well being of my family and business."

**Roger Patrizio**  
Owner / Director  
*Colorado Institute of Massage Therapy, Inc.*  
Colorado Springs, CO

"While most planners focus on techniques and symptoms, Don has a remarkable ability to uncover a client's core issues that may have stymied estate and/or business planning for years. Most often, the real issues underlying planning challenges are relational, rather than asset-based, or values-driven rather than related to mere dollars. He is a master at being able to help clients understand options available to them and the consequences of various actions that may be under consideration. Once the client has these enhanced perspectives, they can make implementation decisions much more easily."

**Dave Keesling**  
Principal  
*Philanthrocorp*  
Colorado Springs, CO

"Running a closely-held business without the insights of Don See would not only be shortsighted and endanger the livelihood of valued employees, but virtually eliminate any hope of a lasting legacy. Don asks great questions, is a nonjudgmental listener and provides an objective point of view that's hard for a small business owner to find these days. His impeccable integrity and real-world experience inspires me to be an equally valuable mentor for my customers."

**William D. Esteb**  
President  
*Patient Media, Inc.*  
Palmer Lake, CO  
[patientmedia.com](http://patientmedia.com)

"I've worked with Don on numerous large, complicated estate plans. He's very instrumental in designing the plan and organizing how it all flows together to meet the client's needs. I'm astounded at his knowledge in that field."

**Dennis Thomas**  
Attorney  
Colorado Springs, CO/Little Rock, AR