

JR Wealth Management Publishes Insight on Why Well-Intentioned Wealth Structures Fail Under Later Scrutiny

Sound advice, never checked against the whole plan, can fail under scrutiny. Jonathane Ricci on documentation, intent and client education.

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“

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Jonathane Ricci

today announced the publication of a new article examining why wealth structures built by competent, well-intentioned advisors sometimes fail years after they were created.

The article, "What I See When a Prior Advisor's Work Unravels," written by [Jonathane Ricci](#), a wealth-orchestration attorney licensed in New York and Michigan, and published on [jrwealthmanagement.com](#), describes a recurring pattern the firm encounters when reviewing

existing structures: individual pieces of advice that were sound in isolation, combined without anyone examining how they interacted with a client's broader plan.

"Professionals solve the problem directly in front of them," Ricci said. "What frequently goes unexamined is how that decision touches everything adjacent to it: tax exposure, [asset protection](#), succession planning, financing, regulatory standing, family governance, and opportunities the client hasn't thought about yet."

The article identifies a second recurring gap: inadequate documentation of intent, authority, and decision-making at the time a structure is built, which can turn a routine clarification into a genuine dispute years later, once the people who could have resolved it easily are no longer available to ask. It also addresses incomplete client education, noting that clients are frequently told what a structure can accomplish without being told, with equal clarity, what could go wrong with it.

Key themes covered in the article include:

- Why individually sound advice from separate professionals can still leave gaps between

disciplines

- The role of contemporaneous documentation in preventing disputes that surface years later
- Questions the firm asks when diagnosing an existing structure, including how a business decision affects tax exposure, succession, and long-term planning

This article is published for educational purposes and does not constitute legal, tax, or investment advice. For guidance on a specific situation, readers are encouraged to consult qualified professionals familiar with their own facts.

The full article is available at

<https://www.jrwealthmanagement.com/blog/prior-advisor-work-unravels/>.

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