JR Wealth Management Founder Jonathane Ricci Publishes Article on the Coordination Gap Between Disconnected Advisors

An accountant, advisor, insurer and lawyer, each correct, and the client still exposed. Why coordination is its own category of work.

Jonathane Ricci, wealth-orchestration attorney and forthcoming host of the UNJUST MATTERS™ podcast.

TORONTO, ON, CANADA, September 30, 2026 /EINPresswire.com/ -- JR Wealth Management today announced the publication of a new article by founder Jonathane Ricci examining a pattern the firm has observed across high-net-worth families: professional advisors who each perform competently within their own discipline, without any one of them being responsible for how their advice interacts with the others.

The article, "The Origin Story: Why Disconnected Advisors Fail," published on jonathanericci.com, describes a case early in Ricci's career involving a business owner who had retained an accountant, a financial advisor, an insurance professional, and legal counsel, each performing their individual role correctly, with no single relationship reviewing the client's affairs as a whole. The result, according to the article, was unaddressed tax exposure, gaps in asset protection, and no succession plan, none of which came from any individual advisor's error.

"The failure lived entirely in the space between the four files, in decisions nobody owned because no single engagement letter covered them," Ricci said. "Most people with means have assembled a roster that looks a great deal like his, and have never had all of them in the same conversation."

The article describes this as a coordination gap in conventional wealth advisory practice, where each professional relationship is structured around a defined lane of work, and no relationship is structured around the seams between those lanes. It frames coordination as a distinct category of work, not an additional advisor, focused on how legal, tax, financial, and insurance decisions

affect one another over time.

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>
> *Jonathane Ricci*

Key themes covered in the article include:
- Why individually correct professional advice can still leave a client worse off
- The difference between wealth creation and wealth preservation as distinct disciplines
- What it looks like in practice for one relationship to take responsibility for coordination across a client's advisory team

This article is published for educational purposes and does not constitute legal, tax, or investment advice. Readers with questions about their own circumstances are encouraged to consult qualified professionals familiar with their specific facts.

The full article is available at https://jonathanericci.com/why-disconnected-advisors-fail/.

About JR Wealth Management: JR Wealth Management provides comprehensive, coordinated wealth management services for high-net-worth families and business owners, including Managed Legal Expertise™, the coordination of qualified attorneys and licensed professionals within a client's overall plan. JR Wealth Management does not provide legal advice. Investment advisory services, where applicable, are offered through licensed persons who are appropriately registered. Registration does not imply any level of skill or training.

Jonathane Ricci
JR Wealth Management
+18559468496 ext.
pr@jrwealthmanagement.com

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