WHAT TO EXPECT

WELCOME!

If you scheduled an in-person appointment, you will head to our office at 5855 Ridge Bend Road, Memphis, TN 38120. Drive up a small hill into our parking lot. We have a large front porch. Come right in!

ZOOM

If you scheduled a virtual appointment, you'll receive an email including your appointment date, time, and a link to join your meeting. If you have any difficulty joining, give us a call at (901) 682-7449 and we'll see if we can help!

Dawn Burgess
Director of First Impressions

MAKE YOURSELF AT HOME

You'll be greeted by Dawn Burgess, our Director of First Impressions, or another Team Member, and seated in a conference room. We will offer to serve you coffee, soda, or water.

Masks are optional here so we will follow your lead. We are happy to conduct meetings with or without masks.

YOUR CREW

While we are one large Team, we function within smaller "Crews" to give clients the focused care they deserve.

At your meeting, you will meet with your Financial Advisor and his/her Paraplanner.

PREPARING

We are preparing for our time with you by reviewing the Confidential Client Profile you have returned to us. You may also want to bring a copy of your budget, current statements, and a list of your questions. However, none of this is necessary. We'll have lots of questions for you!

THE MEETING

A first appointment typically lasts 45-60 minutes. There is no charge for this consultation. If you decide our Team is a good fit for you, your Advisor will discuss our fees with great transparency.

You will always receive an email summary from your Crew following your appointment. No need to write detailed notes unless you prefer to do so.

FOLLOW UP

You will receive your email summary along with any follow-up tasks decided upon in the meeting. We are honored to meet you and would love to earn your trust!

P.S. Don't miss the Debt Free Wall on your way out! We are proud of our clients who have paid off over $2 million in debt!