

CLIENT STORIES

# Tammy & Jenny

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A long-time client “Tammy” asked if I could talk with her sister when she was in town. Tammy was concerned about the dire situation that her sister found herself in.

I reiterated that if “someone is important to you, they are important to us.”

Recently, Tammy’s sister “Jenny” came to Charlotte for a visit.

The two sisters came to the office together.

Immediately, you could feel the anxiety and the tension in the air.

My business partner, Jeff, said, “Take a deep breath. Relax. Let’s have a casual conversation.”

Slowly, the anxiety melted away.

The tension turned to laughter.

More importantly, the path forward was clear to all and documented in plain language with simple and concise next steps.

Jenny’s financial situation was **not dire**.

Honestly, she was in pretty good shape.

I am proud of Tammy for asking if we would be willing to help.

**We are always honored to help someone important to you.**

However, I am so happy for Jenny because I know she feels in a better place than before we met.

Jenny is not alone.

# Tammy & Jenny continued

We have met many people who were not ready to meet with a financial planner.

They may not feel ready for various reasons: embarrassment, shame, too much debt, not enough money, feeling uneducated about a topic, fear of being judged, etc..

Often, you are in better shape than you may realize.

Most importantly, I haven't met a person who felt worse after having the initial meeting to discuss their financial planning situation than before.

Worst case scenario, you aren't on track but have a path forward. To me, that is a big win!

Regardless of where you are, a financial plan gives you clear and concise next steps to take you from where you are to where you want to go.



If you or someone you're close to could use help aligning their finances and establishing a financial plan, please reach out to us, we're accepting new clients and eager to help.

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