# Meet Your Advisory Team

Different members of our team specialize in different aspects of your financial experience.
Knowing who to contact can help us serve you more efficiently and get you answers faster.

| Welcome Team | Client Service Team | Financial Assistant Team | Paraplanner Team | Lead Advisor Team |
|---|---|---|---|---|
| Responsive support for day-to-day needs | Documentation and account maintenance | Asset transfer and allocation services | Ongoing communication and planning expertise | Strategy, oversight, and fiduciary guidance |
| **What We Do** | **What We Do** | **What We Do** | **What We Do** | **What We Do** |
| • Guide new clients through our onboarding process<br>• Coordinate meeting scheduling and confirmations<br>• Field all communications | • Open new accounts and process paperwork<br>• Establish MoneyLink and account features<br>• Manage beneficiary and account administration requests | • Monitor account funding and transfer progress<br>• Track onboarding and implementation milestones | • Prepare financial planning analyses and deliverables<br>• Support implementation and planning follow-up activities<br>• Coordinate annual review preparation and documentation | • Serve, advise, and coach clients<br>• Provide personalized financial recommendations<br>• Guide important financial decisions and planning strategies |
| **Contact Us When You Need** | **Contact Us When You Need** | **Contact Us When You Need** | **Contact Us When You Need** | **Contact Us When You Need** |
| ✓ To schedule Discover, Deliver, & Review Meetings<br>✓ To update to your contact information<br>✓ Answers - we'll connect you with the best person | ✓ To open a new account or completing paperwork<br>✓ To set up MoneyLink or account services<br>✓ To update beneficiaries or account details | ✓ Answers about account transfers or funding status<br>✓ Updates on onboarding implementation progress<br>✓ Assistance with Schwab or Orion platforms | ✓ Answers about planning deliverables or recommendations<br>✓ Follow-up items from planning meetings<br>✓ Information requests related to your financial plan | ✓ To discuss financial goals or life changes<br>✓ Questions about recommendations or strategy<br>✓ Making important financial decisions<br>✓ Support due to life event |
| **Team Members** | **Team Members** | **Team Members** | **Team Members** | **Team Members** |
| Julie Schottland<br>Elise Hollingsworth<br>Carson Gardner | Michelle Profitt<br>Julia Blackford | Rachael Hollingsworth<br>Brooke Lighthall | Adam Williams<br>Kemper Baum<br>Roxie Dillon<br>Ian Sallee | Jeffrey Larkin<br>Doug Johnson<br>Kelli Wallace<br>Sara Keith |

Financial Security Management
A Registered Investment Advisor

## Not sure who to contact?

Reach out to any member of our team and we'll connect you with the right person.

*Call/Text:* (303) 988-1411
*Email:* communications@fsm-inc.com
*Website:* www.fsm-inc.com

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