



2023

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# ANNUAL REPORT



**FINANCIAL  
SYMMETRY**  
ENHANCE TODAY | ENRICH TOMORROW

# AN OVERVIEW OF 2023

## Celebrating Milestones

Financial Symmetry's podcast released its 200th episode in 2023, thanks to the dedication of show host, [Chad Smith, CFP®](#) and many of the other FSI advisors and shareholders. If there is a topic you'd be interested in hearing us cover, we'd love to hear about it.

## Celebrating Professional Growth

Our commitment to continuous learning, professional development, and exceptional service to our clients opened new opportunities for many of our team members in 2023.

[Angela Keeley-White](#), [Darlan Billingsley, CFP®](#), and [Colton Tickle](#) became FSI's newest shareholders in 2023.

[Cameron Hendricks, CFP®, ECA, CEPA](#) earned the [Equity Compensation Associate](#) designation via the [Silicon Valley Executive Center of The Leavey School of Business](#). This is an advanced professional designation for advisors who provide the breadth of specialized skills required to discuss equity compensation strategies, taxation, and plan design with equity plan participants.

[Niamh Douglas, CFP®](#) earned the Certified Financial Planner™ designation and was promoted to an Advisor role.

[Meredith Keel](#) was promoted to Portfolio Accounting Manager.

[Sam Knighton](#) was promoted to Senior Client Service Associate and [Garrison Weaver](#) and [Molly Kaminski](#) joined us as Client Service Associates.

[Matthew Schulman](#) joined us as a Tax Planning Associate following his two internships with us.

[Jade Brookreson](#) joined us as an Operations Associate focusing on trading and asset movement.

[Clare McGurk](#) joined our team as our new receptionist. She's a welcoming presence in our office!

# AN OVERVIEW OF 2023




## Celebrating Our Community

Our team continued to sponsor families for the third consecutive year through the Wake County Holiday Cheer program and volunteered at the Food Bank of Central and Eastern North Carolina.

Christian Polanco, CFP®, Garrick King, CFP®, Niamh Douglas, CFP®, and Emma Turner, FPQP® volunteered with 3rd Decade, a 501(c)3 nonprofit. Their volunteering helps participants practice budgeting and develop new habits that promote saving instead of spending.

## New Office Space

Our team relocated in January 2023 to a new office that allows us more flexible meeting spaces for our clients and team. We have been fortunate to keep our location near major highways in west Raleigh, and it has been wonderful settling in with the future expansion of the PNC Arena area coming soon.



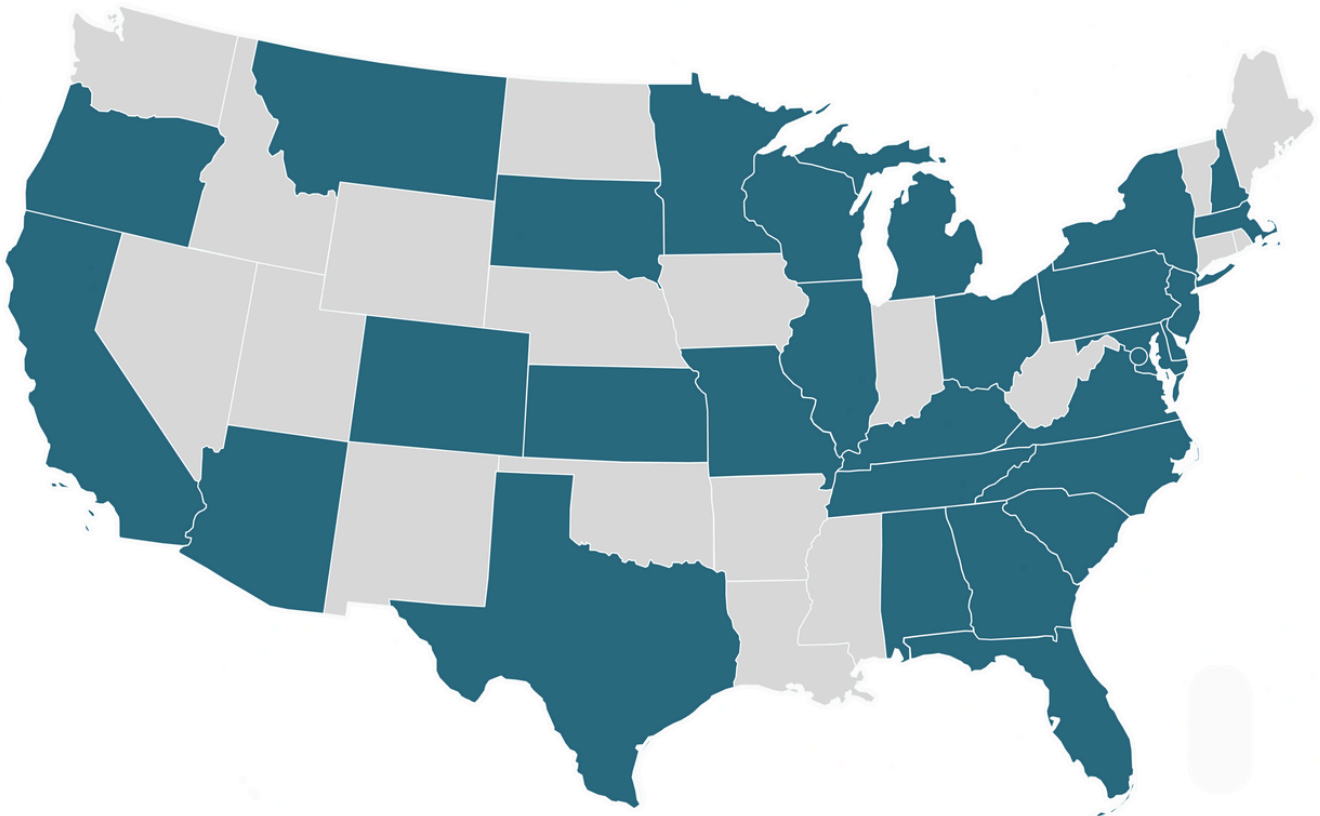
We hope to see you soon, whether in person or virtually.

## Celebrating What's Most Important: YOU!

We thank each of our clients for the trust you place in us. We're grateful to navigate life with you in the form of financial advice and coaching. We look forward to continuing to enhance today and enrich tomorrow for each of our clients.

# LOCAL ROOTS WITH A NATIONAL REACH

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Thanks to our growing online presence, clients moving across the country, and your referrals of family and friends, we now have clients in **30** states!

# YEAR IN REVIEW

## JANUARY

- We moved into our new office



## FEBRUARY

- Ella Brotherton joined the team as an intern
- We reopened our office following our move



## MARCH

- Allison Berger, CFP® was featured in Morningstar Magazine



## APRIL

- Angela Keeley-White, Darian Billingsley, CFP®, and Colton Tickle became FSI's newest partners



## MAY

- We held our annual Mission/Vision event



## JUNE

- Molly Kaminski and Garrison Weaver joined the team



# YEAR IN REVIEW

## JULY

- Our team spent a day volunteering at the Food Bank of Central and Eastern North Carolina



## SEPTEMBER

- Mike Eklund, CFP®, CPWA®, CRPC®, MBA attended the Investments and Wealth Institute Conference



## NOVEMBER

- Clare McGurk joined the team
- We volunteered at the Inter-Faith Food Shuttle



## AUGUST

- Cameron Hendricks, CFP®, ECA, CEPA earned the Equity Compensation Associate designation
- Matthew Schulman joined the team



## OCTOBER

- Jade Brookreson joined FSI



## DECEMBER

- Our team participated in the Wake County Holiday Cheer Program



# 2023 BY THE NUMBERS

## SOCIAL

191k



WEBSITE  
VIEWS

1,639



SOCIAL MEDIA  
FOLLOWERS

3



PRESS  
FEATURES

## CLIENTS

9



CLIENTS  
ENTERED  
RETIREMENT

9



CLIENTS  
WELCOMED A  
BABY

10



CLIENTS  
PURCHASED A  
NEW HOME

## FSI

\$958M



ASSETS  
MANAGED

750



CLIENTS  
SERVED

72



NEW WEALTH  
MANAGEMENT  
CLIENTS

5



NEW TEAM  
MEMBERS

10



INTERNS  
IN 2023

# THANK YOU!

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**We appreciate the opportunity to serve you.  
If there is anything else you would be  
interested to see in our future annual  
reports, please let us know!**





# 2023



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