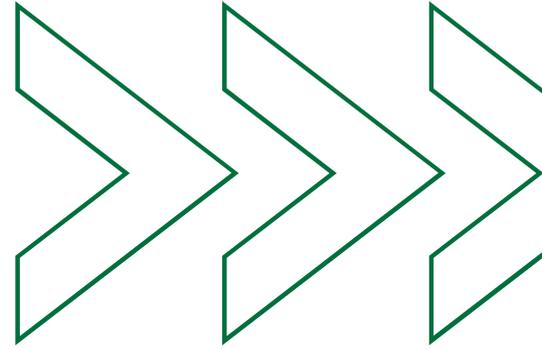




# 2022 ANNUAL REPORT



ENHANCE TODAY  
ENRICH TOMORROW



*a year's overview*

**2022**

### **Accolades Worth Celebrating**

Financial Symmetry was recognized for the second year in a row as one of the 2022 InvestmentNews Best Places to Work for Financial Advisors.

**Chad Smith, CFP®** and **Allison Berger, CFP®, CeFT®** were selected as two of **Investopedia's 100 Top Financial Advisors of 2022**. Chad was previously on the list in 2021 and 2020.

### **Celebrating Professional Growth**

**Haley Modlin, CFP®** became FSI's newest shareholder in 2022.

**Allison Berger, FP®, CeFT®**, earned the Certified Financial Transitionist® designation. This designation combines planning with cutting-edge research in neurology, sociology, and psychology to help clients successfully navigate both the technical and personal sides of major life transitions involving money.

**Cameron Hendricks, CFP®, CEPA**, earned the Certified Exit Planning Advisor certification via the Exit Planning Institute. This is an advanced professional certification for advisors who provide the breadth of specialized skills required to discuss exit planning strategies with privately held businesses.

**Emma Turner, FPQP®** earned the Financial ParaPlanner Qualified Professional™ designation and was promoted to Senior Client Service Associate.

**Garrick King, CFP®** earned the Certified Financial Planner™ designation and joined our Advisor team following his promotion as a Senior Client Service Associate.

**Sam Knighton** was promoted to Client Service Associate and **Levi Ball** joined us as a Client Service Associate following his internship.

### **Celebrating Our Community**

Our team continued to sponsor families through the Wake County Holiday Cheer program, participated in several charity golf tournaments and volunteered at the Food Bank of Central and Eastern North Carolina. Christian Polanco, CFP®, Garrick King, CFP®, Niamh Douglas and Emma Turner 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.

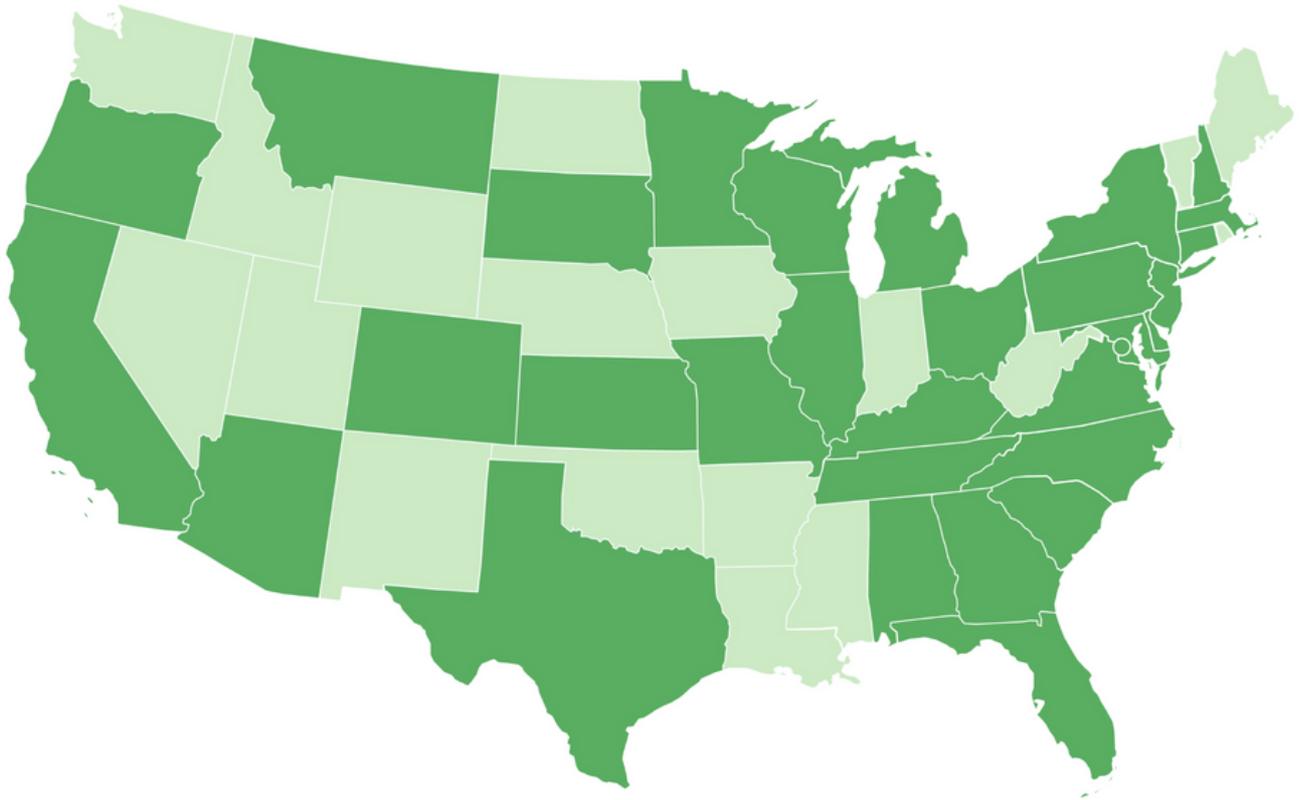
## **Looking Forward to a New Office Space**

Our team relocated in January 2023 to a new office that allows us more flexible meeting spaces for our clients and team. We 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 serve you through every phase of life.

# LOCAL ROOTS WITH A NATIONAL REACH



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

**31** states!

# YEAR IN REVIEW

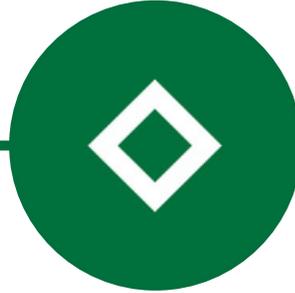
## JANUARY

- Haley Modlin, CFP® becomes Partner at Financial Symmetry
- Levi Ball joins full-time as a Client Service Associate



## FEBRUARY

FSI Mission/Vision Kickoff: A Celebration of 20 years



## MARCH

FSI was recognized in the Investment News 2022 Best Places to Work for Financial Advisors



## APRIL

Team building event at the Durham Bulls



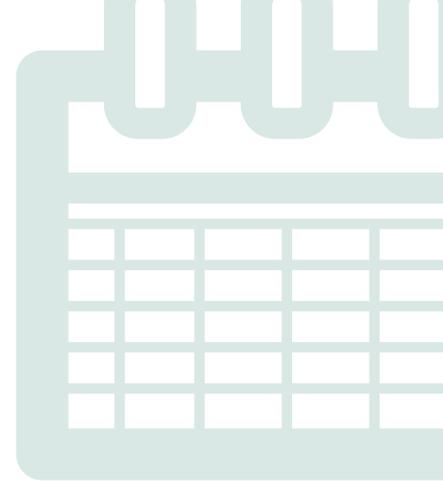
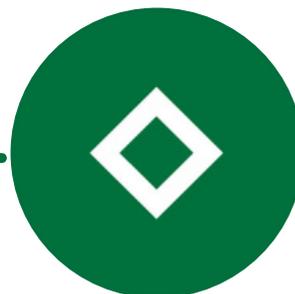
## MAY

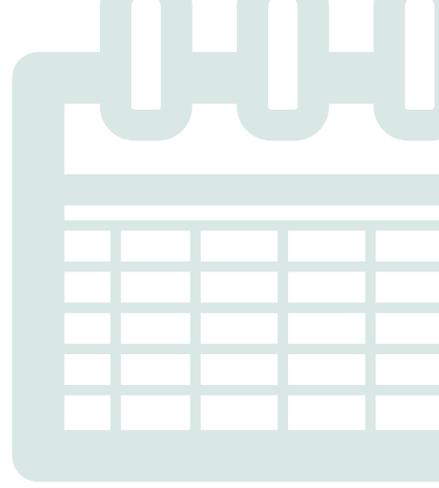
The FSI team volunteered at the Food Bank of Central & Eastern North Carolina



## JUNE

First all advisor meeting in the office since 2020





## JULY

Garrick King, CFP® is Financial Symmetry's newest advisor



## AUGUST

- Sam Knighton was promoted to Client Service Associate
- Chad Smith, CFP® and Allison Berger, CFP® were named in Investopedia's 100 Top Financial Advisors of 2022



## SEPTEMBER

Emma Turner, FPQP® earned Financial Paraplanner Qualified Professional designation



## OCTOBER

Financial Symmetry attended the Nick Murray and DFA conferences



## NOVEMBER

FSI sponsored the Women: A Force in Business Conference



## DECEMBER

FSI published the 180th podcast episode



# 2022 BY NUMBERS

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## SOCIAL INFLUENCE



Website Views



Social Media Followers



Press Features

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## CLIENTS



Clients Entered Retirement



Clients Welcomed a Baby



Clients Purchased a New Home

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## FSI AS OF 3/31/2023



Million Assets Managed



New Wealth Management Clients



New Team Member



Clients Served



Interns in 2022

# THANK YOU!



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



# 2022

**ENHANCE TODAY  
ENRICH TOMORROW**

