

FINANCIAL SYMMETRY

Annual Report

2024





2024 Year in Review

Key Moments

Financial Symmetry crossed a significant milestone in 2024, surpassing **\$1 billion** in assets under management (AUM). This accomplishment would not have been possible without the dedication of our team.

Growing, Learning, and Achieving

Ella Brotherton and **Riley Davison** joined our team as Client Service Associates, following their internships with us.

Niamh Douglas, CFP® was promoted to an Advisor role.

Ella Brotherton, **Riley Davison**, **Molly Kaminski**, and **Garrison Weaver** successfully earned the Financial Paraplanner Qualified Professional SM (FPQP®) designation from the College for Financial Planning.

Grace Kvantas achieved the Certified Divorce Financial Analyst (CDFA®) certification.

Jade Brookreson completed the Series 65 – Uniform Investment Adviser Law Exam.

Riley Davison, **Molly Kaminski**, **Emma Turner**, and **Ella Brotherton** began the Certified Financial Planner™ coursework.

Matthew Schulman began working on the IRS Enrolled Agent designation.

Together, We Make a Difference

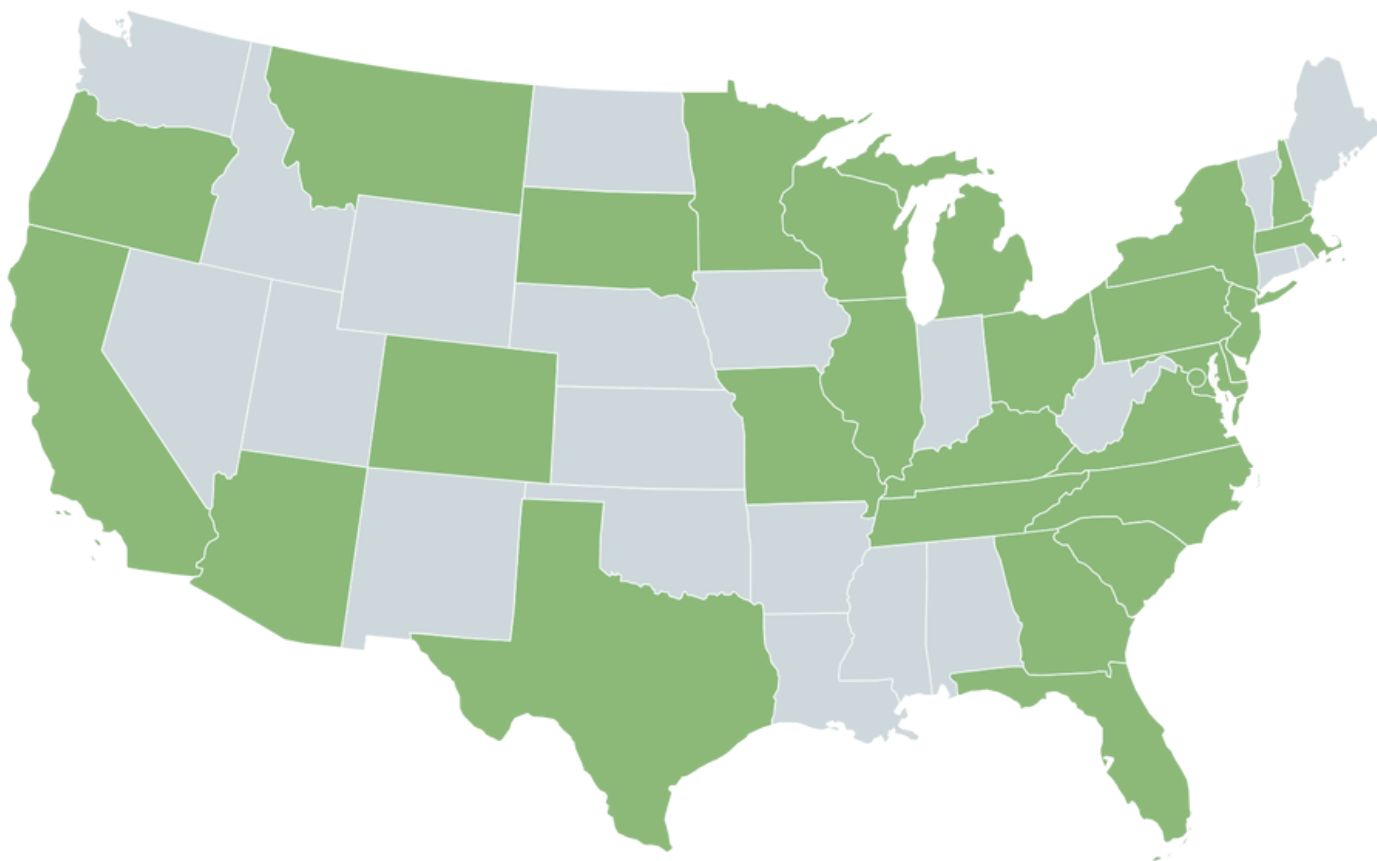
Our team continued to prioritize community engagement in 2024 by performing volunteer farm tasks at the Inter-Faith Food Shuttle Farm, distributing gifts with Wake County Holiday Cheer, and giving a presentation to local high school students about key financial topics.

We also continued our multi-year partnership with 3rd Decade, a 501(c)3 nonprofit that helps promote budgeting and saving strategies.

Locally Based, Nationally Trusted

Your Success Is Our Greatest Achievement

We truly appreciate each of our clients for putting trust in us to help you achieve your financial goals. We look forward to continuing to help you enhance today and enrich tomorrow as we help you navigate life in the form of financial advice and coaching.



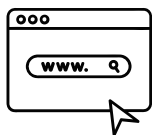
Thanks to our growing online presence, clients moving across the country, and your referrals of family and friends, we now have clients in **27** states and Washington, D.C.



2024

By the Numbers

Social



293k

Website views



1,708

Social media
followers

Clients



8

Entered retirement



5

Welcomed a baby



4

Purchased a new
home



2024

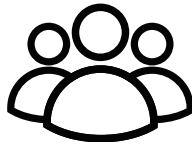
By the Numbers

Financial Symmetry



\$1B

Assets managed



805

Clients served



65

New Wealth
Management clients



2

New full-time
team members



7

Interns in 2024



Thank You!

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





**FINANCIAL
SYMMETRY**
ENHANCE TODAY | ENRICH TOMORROW

 www.FinancialSymmetry.com

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