Financial Symmetry

Financial Symmetry's

ANNUAL REPORT 2019

2019: A Year in Growth

Our Clients Grew
In addition to welcoming our 500th client, we were honored to celebrate alongside our clients many memorable events: the birth of children and grandchildren, weddings, high school and college graduations, promotions and accolades, as well as successful business transactions. We were proud to help 20 clients make the transition into retirement in 2019. However; along with the celebratory moments also came times where we mourned the deaths of clients as well as the passing of loved ones. We are honored to be a part of your lives through the many ups and downs that life presents.

Our Systems and Client Experience
We continue making improvements with the go-to hub for our clients on Client Center. Much of this progress is based on feedback we have received from you. We enhanced our risk assessment tools to improve your investment experience, and in 2020 you will be able to view details of your investment portfolio on Client Center.

We also continue to fine-tune our workflows and checklists to take advantage of different opportunities for our clients. We are now up to 48 workflow items and 68 checklists covering a large variety of services we provide such as reviewing tax returns, rolling over accounts, and updating financial plans.

Our clients also have benefited from the knowledge gained through our 100 podcast episodes, over 30 YouTube Videos, and new additions to our blog post library which is now over 500 articles.

FSI NCSU Tailgate

Our Team Grew
We were proud to add 3 new members to the team over the past 12 months. Christian and Niamh joined us as client service associates, and Sam as our administrative assistant. We continue to be humbled by the talent of our employees and the care they take in serving our clients daily.

In addition to our new hires, members of our team grew in their roles and responsibilities as well, with Angela being promoted to client service manager and Grace becoming our newest partner!

Our internship program also continued its strong track record of supporting financial education. Since the inception of the firm our internship program has had over 95 participants.

Our Knowledge and Skillset Grew
In addition to our standard continuing education requirements through our professional designations, members of our team earned additional designations and attended industry conferences. Grayson became an Enrolled Agent (EA), Mike became a College Funding and Student Loan Advisor (CFSLA), Colton became a Chartered Mutual Fund Counselor (CMFC) and Haley passed the CFP exam becoming our newest Certified Financial Planner! Numerous advisors attended conferences throughout the year such as Wealth Stack, NAPFA, FinCon, and multiple Dimensional Fund Advisor education events.

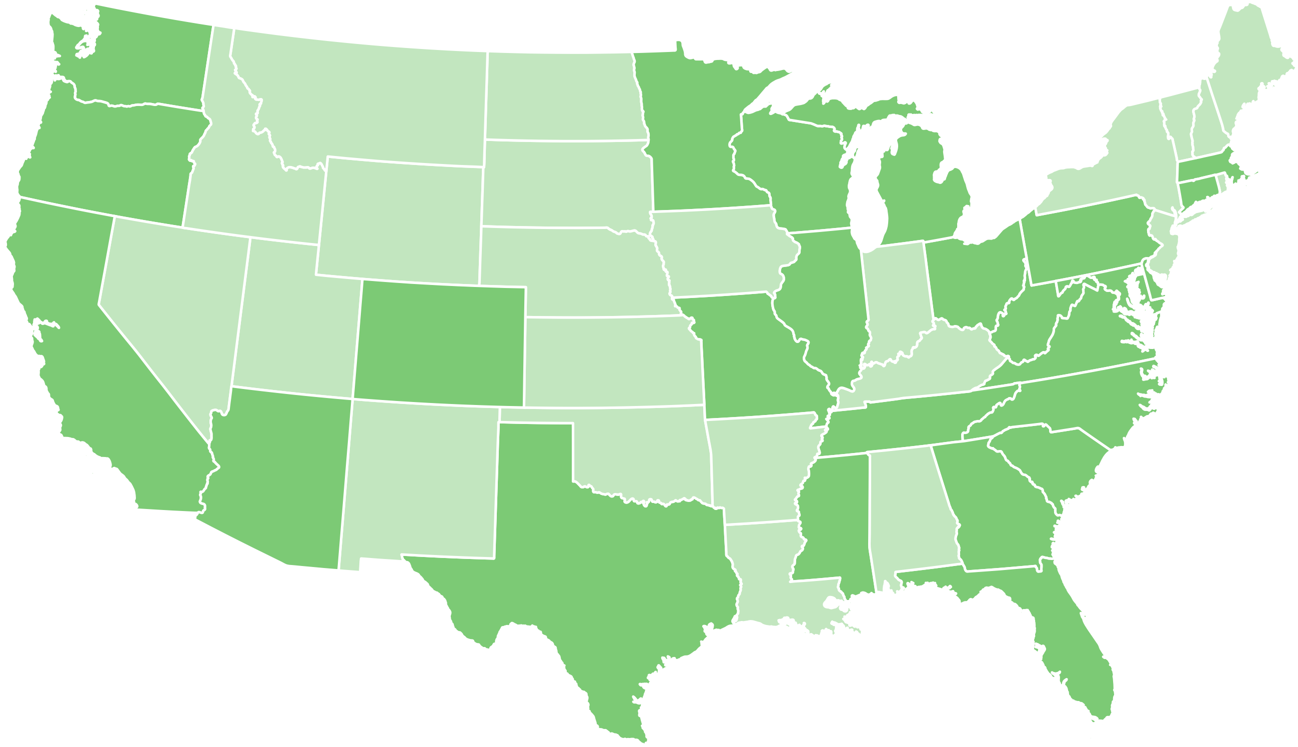
Lastly, Allison was selected to the NAPFA South Region Board as the Academic Outreach Coordinator which connects college financial planning programs to NAPFA in order to further enhance the reach and awareness of fee-only financial planning.

Our Community Grew
As a firm we continued our team development and increased our involvement in the community. As a group we volunteered at the Food Bank of Central & Eastern NC, participated in multiple charitable golf events, hosted our 9th annual Durham Bulls client appreciation event, invited our families in for a bring your kid to work day, sponsored the NC Chamber "Women: A Force in Business" Conference, and held presentations at NC State University, Campbell University, and Money Wise Mommas.

In Closing
We thank each of you for the trust you place in us to navigate life with you in the form of financial advice. We look forward to 2020 and 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 25 states!



FSI Durham Bulls Night

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Year in Review

JANUARY
Christian Polanco joins FSI

FEBRUARY
Lunch and Learn with Attorney Adam Tarsitano

MARCH
Grace Kvantas becomes partner

APRIL
Completed 173 tax returns

MAY
Sam Knighton joins FSI, FSI launches YouTube channel

JUNE
9th annual client appreciation event

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JULY
Bring your kid to work day, Allison featured on Spectrum News

AUGUST
DFA conference

SEPTEMBER
FinCon, Wealth Stack conference, Niamh Douglas joins FSI

OCTOBER
FSI Tailgate, Campbell banking career focus day, NCSU Finance Club presentation by Allison

NOVEMBER
Women: A Force in Business Conference, NC State University Club presentation

DECEMBER
FSI holiday party

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By the Numbers

82,755
Website views

3
New team members

$495
Million assets managed

9
Press features

240
Continuing education hours

60
New clients

782
Social media followers

40
New Youtube videos

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!

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