

Are you a HINRY? (High Income, Not Rich Yet)

You need financial planning. What if you don't meet their \$1 million investment minimum, but you don't want to settle for an 1-800#... talk to AC Echo



Our goal is to guide you to a position, financially, so that you can do what you want, when you want, without stressing about money.

YOU'RE FINALLY MAKING \$300K+ AND YOU DON'T KNOW HOW TO PRIORITIZE YOUR FINANCIAL GOALS.

We help clients with these questions every day.

YOU'VE ACCRUED SOME STUDENT LOANS AND IT IS STRESSING YOU OUT.

We can analyze them for you and come up with a plan to pay them off.

RETIREMENT. STUDENT DEBT. SAVING FOR KIDS' COLLEGE. EMPLOYEE BENEFITS.

We are your personal financial concierge with transparent pricing.

What is your financial finish line?

We can help you get there.





Don't Delay Securing Your Financial Future

SCHEDULE A MEETING

Who We Help

If you don't meet their \$1 million investment minimum, but you don't want to settle for an 1-800#... talk to AC Echo



Young Executives

From appropriately directing your bonus funds, to managing your stock options, and helping you save for retirement, we work virtually to fit your busy schedule.



Healthcare Professionals

As a healthcare professional your time is precious. That's why we work virtually to fit your busy schedule to help you craft a plan to pay down your student debt, purchase a home, save for retirement, and saving for your kids' college education.





Lawyers

We collaborate with you to implement all the pieces of your financial plan. From planning for tax implications, saving for retirement, and devising plans for uneven cash flow. We can even make recommendations to other qualified professionals.

**Do you know exactly what you
own
and why you own it?**

Leading Technology to Simplify and
Organize your Finances

Overview

Our Flat Fees



Defined Goals

You're eager to achieve financial independence; we're here to help you define and prioritize your goals to jump start you on the path to success.



Virtual Meetings

We know you're busy, and we want to get together in a convenient manner – whether that's phone calls, virtual hangouts, or in person meetings.



Realistic Plans

We'll explore your personal balance sheet, craft a plan specific to your finances & establish a realistic budget to pay off debts while saving for your future.



Leading Tech

At AC Echo, we harness the power of leading technology to streamline the investment and financial planning process. From an integrated investment and retirement planning portal, online plan delivery, and paperless process, we strive to simplify your financial life.

We're Here for You

[SCHEDULE A MEETING](#)



establish a sound financial future. Our advisors are especially well-versed on the specific needs of physicians and medical residents who are balancing paying off student loans while saving for their families future.

Eric Chetwood, CFP®

MANAGING PARTNER

Rick Adams, MFS

MANAGING PARTNER

Michelle Disney, CFP®

Katherine Edwards, CFP®

Rebecca Gatlin

CLIENT ASSOCIATE

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Ready to Get Started?

Get Started Today with Our Streamlined Process



1. Schedule a Call

Our introductory call will help us get to know you better and ensure we're a good fit. No synergy? No problem. We'll point you in the right direction.

[SCHEDULE YOUR CALL](#)



2. Listening Meeting



3. Action Plan

Your customized action plan will be unique to your needs and will set you on the path to achieve your financial goals.

Connect With Us

Want to know more about how it all works? Shoot us an email or call us via the information below:

QUESTIONS? CONTACT US @

katherine.edwards@adamchetwood.com

(919) 287-5660

LOCATION

AC Echo

3917 University Drive Suite 200

Durham NC 27707

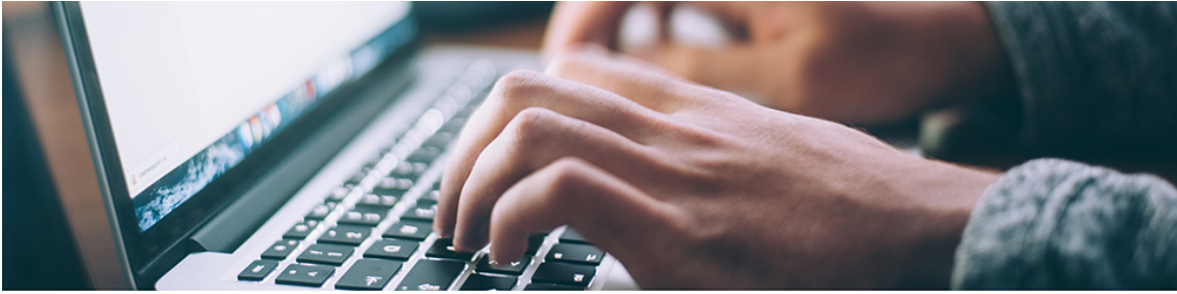
**"By failing to plan, you are
planning to fail."**

- Benjamin Franklin

Client Center



SCHEDULE WITH AC ECHO



OPEN AN ACCOUNT



EXISTING CLIENT LOGIN



ONLINE PAYMENT



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