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retirement planning. Our client relationships are at the core of everything we do.

As
Heard
On:



Upcoming Financial Classes

If you are retired or getting close to retiring, do you have a clear financial plan that will help you live the lifestyle in retirement you've always dreamed of? Several times a year, Jim teaches financial education classes at the University of Tennessee and Pellissippi State Community College to teach adults the fundamental principles of financial planning in retirement.



**Thrive Financially in
Retirement**

August 13 & 20, 2019

Hardin Valley Campus

October 10 & 17, 2019

Blount County Campus

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Financial Survival for Retirement®

May 9 & 16, 2019

Conference Center, Downtown

September 5 & 12, 2019

Conference Center, Downtown

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How May We Serve You?



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A Review of the Tax Cuts & Jobs Act

The major changes and what
that could mean for you

DOWNLOAD THE GUIDE
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