WELCOME TO EVERGREEN ADVISORS

The picture you see above is that of a wonderful town and place we call home. This new and revitalized Chattanooga did not come about by accident. Its rebirth was part of a long-term and well designed plan. Vision, hard work and time made this a reality.

We at Evergreen understand that the financial planning process is no different. Good wealth management should make you feel more confident. Our team looks at your

NAVIGATION:

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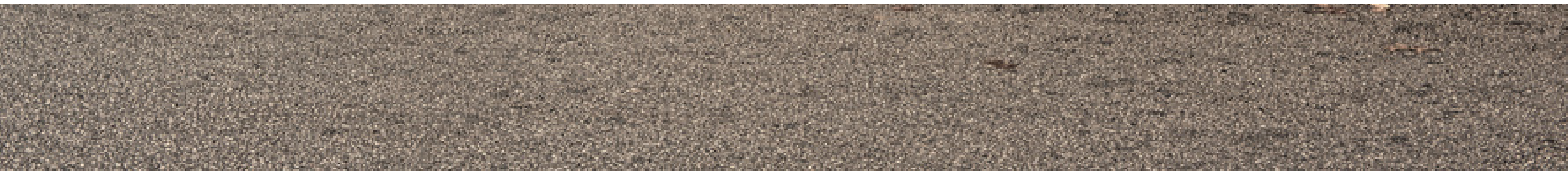
care. Your economic future demands a vigilant ongoing management approach.

Cookie policy

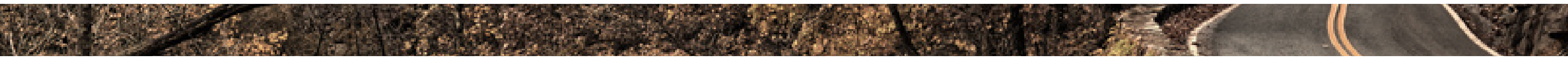
Thank you for visiting our website. Please spend some time reviewing the content. We also have a brochure available. If you would like to setup an initial appointment or have further questions, please feel free to contact us or click here to schedule an appointment.

With kindest regards,

The Evergreen Team



WHO WE ARE



WHO WE ARE

Evergreen Advisors is a fee-only Registered Investment Advisor. This means, first of all, that we are legally bound to put our clients' best interest ahead of our own – a standard we're proud to meet. It also means that our financial success is tied to our clients' success. Since we are compensated based on the value of your assets, we recommend what's best for you – not what pays a high commission or will run up trading costs.

Currently, Evergreen Advisors manages about $120 million in assets for clients in more than a dozen states. Our company roots go back to the early '80s, when founder Jim Place first decided to serve financial planning clients independently. Over the years, Jim's vision has developed into an advisory firm widely known for its time-tested experience and twenty-first century expertise. We're big thinkers, yet small enough to remain fiercely committed to what's best for our clients.

Meet our people:

Jim Place, CFP®

Michael O'Donnell, CFP®, CPA, MBA

Jayme O'Donnell, MBA

Jack Chrisman, Financial Advisor

Barbara Harris, Director of Client Services

WHAT WE BELIEVE IN

At Evergreen Advisors, we want to help our clients and co-workers realize their personal dreams and recognize the opportunities that await them. By doing so, we hope to enable them to live more meaningful lives and make a greater difference in the world.

Three values are especially important to us:

1. Client Focus. Clients are the center of our professional world. They hire and pay us, and they deserve our best. Every time we talk to, meet with, or think about our clients, it must be in the context of how we can better serve them.

EVERGREEN ADVISORS
WEALTH MANAGEMENT GROUP

HOW WE WORK WITH CLIENTS

To begin with, we'll provide any information you want, whenever you want it. Whether face-to-face or on the phone, you can feel free to ask us questions, share your concerns, or explore alternative scenarios. We'll get together with you regularly to discuss how your portfolio is doing and any changes that may be needed. Meanwhile, you can review your holdings anytime through our online Client Center, protected by 256-bit AES encryption.

Unlike financial firms that seem happy to keep their clients in the dark about investing, we sift through articles, books, and blogs to bring you the best ideas on our own blog and our Recommended Reading list. We believe educated clients make educated decisions.

Continue on to Our People

TOP

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