

## **Emerald Connect | About Us (60MB)**

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Hi, I'm David Ramey.

And I'm Tripp Boyer. We are partners and certified financial planner professionals with the Boyer-Ramey Wealth Management Group. We wanted to take a few moments today to give you a quick introduction to our company.

[MUSIC PLAYING]

If you are not familiar with us, we'd like to briefly share with you who we are, the types of clients that we serve, and the services that we offer.

David and I met over 20 years ago. Over this period of time, we have formed the basis of our professional friendship, as well as we have grown to understand the importance of a wealth management plan that is customized for each of the families that we work with.

As partners who hold the certified financial planner certification, Tripp and I take great pride in helping our clients work to achieve clarity, confidence and structure around all aspects of their financial lives.

An analogy that we often use to explain our services is that of a messy garage. Investment planning can often be a lot like that messy garage. In our experience, our clients have worked hard for years. They have been successful in their careers, they have spent less than they have made, and they have accumulated a financial net worth.

Due to working hard and focusing on their careers and families for years and years, it is common that all their financial stuff can pile up.

Finances can often be just like that messy garage. When we walk past it on the way out the door, we look at it and say, I need to get to that. I need to clean this up. I need to get organized.

Financially, it can be the exact same way. We may have 401(k)s, pensions, investment portfolios, bank accounts, maybe old life insurance policies that haven't been looked at in years, as well as estate planning documents that are out of date or were done when the children were born, or maybe not at all.

Maybe we have children or grandchildren's college to plan for, or even aging parents to consider. We know we want to retire with a nice lifestyle that we have worked so hard for.

We'd like a comfortable and sustainable cash flow designed to last our entire lifetime and beyond. We also know at the end of our days, we'd like to leave what's left to our children, or our loved ones, or perhaps charities we are passionate about, all with a smooth transition.

We believe once we get financially organized, it seems to free up space in our minds and in our relationships to think more clearly and confidently about our futures. We truly have the best job in the world. We create lifetime relationships and get to lock arms with some of the most wonderful people on Earth, and we celebrate their successes along the way. We would welcome the opportunity to discuss your specific situation and unpack all the ways in which we can assist you in working to achieve your goals.

Thank you for watching. Until next time.