

CELEBRATING THE IMPACT OF CFP® PROFESSIONALS

At the Imagine 50 Gala, stories highlighted the confidence CFP® professionals bring to their clients.

A Calming Voice During Overwhelming Times

The Garber Family and James Harrington, CFP®

When Command Master Chief Jeffrey Garber passed away unexpectedly at age 43 while serving his country aboard the USS Dwight D. Eisenhower, his widow Amy's world turned upside down. Coping with her husband's death and caring for her three children, Garber also had to navigate the benefits available to her family through the U.S. Navy and determine the best way to manage the money coming to the family.

Garber was used to handling the family's finances while her husband was deployed, but Jeff had always been the one who managed their investments, and she wanted to make sure that she made the best decisions for her family.

"When you go from tight month-to-month living to a lot of money coming in all at once, it can be overwhelming," she said. Her mom suggested she speak to James Harrington, CFP®, Garber's parents' financial planner.

When she first met James, Garber felt an immediate trust in him because his first concern was for her and her children.

"I remember him being a real calming voice for me during that time ... that person who sees your finances and has an overview of them and can help you know you're going to be OK."

More than a decade later, Garber continues to rely on James' advice. "When I need to make a big financial decision or rethink my goals, [I call James]. I think it would mean everything to Jeff to know that we are being taken care of because it was so important to him."



The Sampson-Weber family

Peace of Mind About a Loved One's Future

The Sampson-Weber Family and Nick Harris, CFP®

Stephanie Sampson began planning for her family's future when her son Grant was first diagnosed with autism. Preparing for any potential financial obstacles that might lie ahead was part of her planning. After managing the family's budgeting and investments became challenging, Sampson connected with Nick Harris, CFP®.

When Sampson met Nick for the first time, she said he listened and asked the right questions. "He has the CFP® [certification] as well as several others that make you realize that he wants to be a person who can help people have a financially secure future," she said.

Nick explained that Sampson was really looking

for someone she and her husband could trust. "Being a CFP® professional is not about just generating revenue and commissions. It's about deep trust and relationships with people for decades," he said.

"People with special needs often get disinherited, and they get disinherited because people don't understand that there are ways to provide for the financial future which don't cost a lot of money. That's why you need a CFP® [professional] who really understands what your long-term needs are going to be," Sampson said.

Working with Nick over time has given Sampson peace of mind that her son will be taken care of even after she and her husband are no longer there. "Not having to worry on a daily basis about where the money is coming from, where the money's going, whether there is going to be anything there, that's just so important."



The Garber family



Lauryn Williams, CFP®

Being Your Authentic Self

Lauryn Williams, CFP®

Lauryn Williams, CFP® is an Olympian. She's also passionate about being a financial educator. Williams won a gold medal in the 4x100 meter relay at the 2012 Summer Olympics, and silver medals at the 2004 Summer Olympics and at the 2014 Winter Olympics.

At her firm, Worth Winning, Williams focuses on budgeting, financial literacy and education, providing her clients with a strong foundation for success. Her interest in becoming a financial educator grew from an experience in college when she became a professional athlete and needed to learn how to manage her finances. Unfortunately, she ended up working with someone who was more salesperson than educator.

"There's a lot more people that are in sales roles and have taken advantage of people in the communities that I come from than there have been people who have actually been trying to educate and facilitate good financial literacy," Williams explained.

During her internship at a firm requiring CFP® certification, Williams saw a stark difference in the service clients received and what she'd received as a client. In her journey to CFP® certification, she also realized that while her finance degree and MBA had taught her many things, neither had taught her about financial literacy or managing personal finances.

Today, Williams finds being her authentic self and allowing her clients to do the same has been key to her success as a financial planner.

"That's what I'm trying to do when I interact with clients — help them realize 'You are not just what you earn. You are not just the job you do. You are not your net worth. You are whoever you want to be, and money is a tool to help you live the life that you want,'" said Williams.



**WATCH
THE
STORIES**



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—Lauryn Williams, CFP®