THIGPEN GROUP

WEALTH ADVISORS

Employee Spotlight
The Ripple Effect of Financial Empowerment
By Krista Nicholson

When I first stepped into the world of wealth management, I saw beyond mere numbers—I saw potential. Potential for transformative change, for dreams waiting to be unleashed, and for communities to flourish when financial knowledge meets opportunity.

At The Thigpen Group, we believe that financial empowerment is about more than just managing money. It's about unlocking human potential. Imagine the world-changing ideas that remain dormant simply because someone lacks the financial foundation to bring them to life. A single parent with a vision for an after-school mentorship program. A young innovator in a low-income community holding the blueprint for a groundbreaking solution. These dreams don't just need inspiration—they need resources.

What truly makes this journey extraordinary are the incredible clients we serve. Each day, I'm humbled by their generosity, wisdom, and heart. Our clients are the embodiment of compassion and purpose. They're not just focused on building wealth; they're building a legacy of kindness. Their stories of resilience, their commitment to making the world better, and their genuine care for others inspire me every single day. Working with such remarkable individuals isn't just a profession—it's a privilege.

Financial literacy is the key that can unlock extraordinary possibilities. When we help someone build wealth, we're doing more than balancing a ledger—we're creating a platform for possibility. We're giving individuals the freedom to invest in themselves, their families, and their communities. From funding innovative nonprofits to supporting entrepreneurial ventures, every financial decision has the power to create a ripple effect of positive change.

Our mission, *"Live Your Life,"* is more than a tagline. It's a commitment to removing financial barriers, allowing our clients to focus on what truly matters: pursuing passions, spending time with loved ones, and making meaningful contributions to the world around them.

This is why I'm passionate about wealth management. It's not just about numbers—it's about potential. It's about creating opportunities that didn't exist before. At The Thigpen Group, we don't just manage wealth; we empower dreams, one financial strategy at a time.

Krista is a Client Services Associate with The Thigpen Group and is currently studying for additional financial certifications.

Legacy Book

Creating a Legacy Book is a heartfelt and practical way to ensure your final thoughts and wishes are clearly communicated to your loved ones after your death. This personalized compilation can include important documents, financial information, cherished memories, instructions for end-of-life decisions, and details about your values and beliefs. By organizing everything in one place, you not only provide clarity and guidance during an emotionally challenging time but also leave a lasting gift that reflects your love and thoughtfulness.

The Thigpen Group believes the Legacy Book is a valuable source of critical information for your loved ones who are helping to settle your estate and personal matters. Creating the Legacy Book may seem like a daunting task, but we have recently discovered a new resource entitled “Final Thoughts for My Family” which will make the process more manageable. If you are interested in adding this new resource to your existing Legacy Book or want to create a book from scratch, **Julie Humphreys**, Director of Operations and Client Services, is happy to assist.

Contact Julie at **jhumphreys@thethipgengroup.com** for more information.

Heckerling Institute on Estate Planning

The Heckerling Institute on Estate Planning is the nation’s leading educational conference for estate planning professionals, offering unparalleled educational and professional development opportunities for all members of the estate planning team. The 59th Heckerling Institute (January 13-17, 2025) covers topics of timely interest to attorneys, accountants, trust officers, charitable giving professionals, wealth management professionals, and nonprofit advisors. The Thigpen Group is pleased to announce that **David Martin**, Director, Private Client Group, will be attending this conference, and we look forward to seeing what he learns about planning effectively in an unpredictable world.

AICPA & CIMA Personal Financial Planning Summit

Scot Thigpen, President and Wealth Advisor, will head to Charlotte, NC, later this month for the 9th annual PFP Summit - a one-of-a-kind gathering of current and future leaders and decision-makers of both CPA and non-CPA financial planning firms. Some have called it a "study group on steroids."

The PFP Summit focuses on topics like leadership, succession, the next generation, building opportunity, company culture, client communication and relationships, marketing and business development, balancing life and work, and more - all topics that can benefit The Thigpen Group and our clients alike.

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