CAPITAL CITY FINANCIAL PARTNERS

NEWSLETTER

AUGUST 2024

AUGUST 2024

HEART OF OUR TEAM: Employee Spotlights

Katie is a Client Service Associate at Capital City Financial Partners. She currently attends the University of South Carolina where she is pursuing a double major in Finance and Real Estate with a minor in PR & Advertising. Her attention to detail has spilled over into her daily roles, which consist of processing paperwork, account applications, and ensuring our advisors are prepared for their meetings. Katie looks forward to witnessing a positive impact our work has on other' lives and is excited to flourish meaningful relationships within our firm.

Katie Stevens
Client Service Associate

Ethan has served as our Advisor Associate since summer of 2023 and has only grown personally and professionally since. Originally from Cincinnati, Ohio, he found his second home at the University of South Carolina, where he studies Finance and International Business, with a minor in Spanish. After studying abroad this past spring semester and gaining real world skills, Ethan is thrilled to be back to serve our client's needs with his commitment to have a deeper perception of financial advising.

Ethan Lex
Advisor Associate

Meet Everett, one of our devoted financial advisors who is "on a mission to provide individuals and families with peace of mind throughout the various phases of their lives." His financial services journey started at the University of Louisiana at Lafayette where he earned his Bachelor's in Finance with a minor in Economics, receiving his Series 7 and Series 66 licenses short after. Currently, he is pursuing his MBA with a focus in Finance, to ensure he is helping people gain financial confidence and independence.

Everett Franks
Financial Advisor

UPCOMING EVENTS

August 3rd: New Rules of Retirement, *Asheville,* 10:30 a.m.

August 6th: Medicare Made Simple, *Columbia,* 11:30 a.m.

August 13th: Taxes in Retirement, *Greenville,* 6:30 p.m.

August 15th: Taxes in Retirement, *Greenville,* 6:30 p.m.

August 19th & 21st: New Rules of Retirement: A 2-Part Webinar *Virtual*, 12:30 p.m. or 7:00 p.m.

August 22nd: Cybersecurity Client Educational, *Columbia,* 12:00 p.m.

August 28th: Estate Planning, *Greenville*, 1:30 p.m.

AS A REMINDER: NEW BUSH RIVER OFFICE

250 BERRYHILL ROAD,
SUITE 510
COLUMBIA, SC 29210

REFER A FRIEND!

We deeply value your trust in us to create a retirement plan that provides you with both confidence and clarity for the future.

Building personal relationships with our clients inspires us to do more to help our community. If you know friends or family who could benefit from our guidance at Capital City Financial Partners, we would appreciate your introductions! Referrals are the highest compliment, and as a thank you, we will make a donation to a charity of your choice for each referral who visits us.

Click here to share information about a loved one or to gather more information on our referral policy.

A referral is made by a current client. The current client receives the benefit of a charity donation in their name. A conflict of interest exists.

AUGUST 2024

ATTENTION ALL CLIENTS!

Cybersecurity Educational

TOPICS INCLUDE

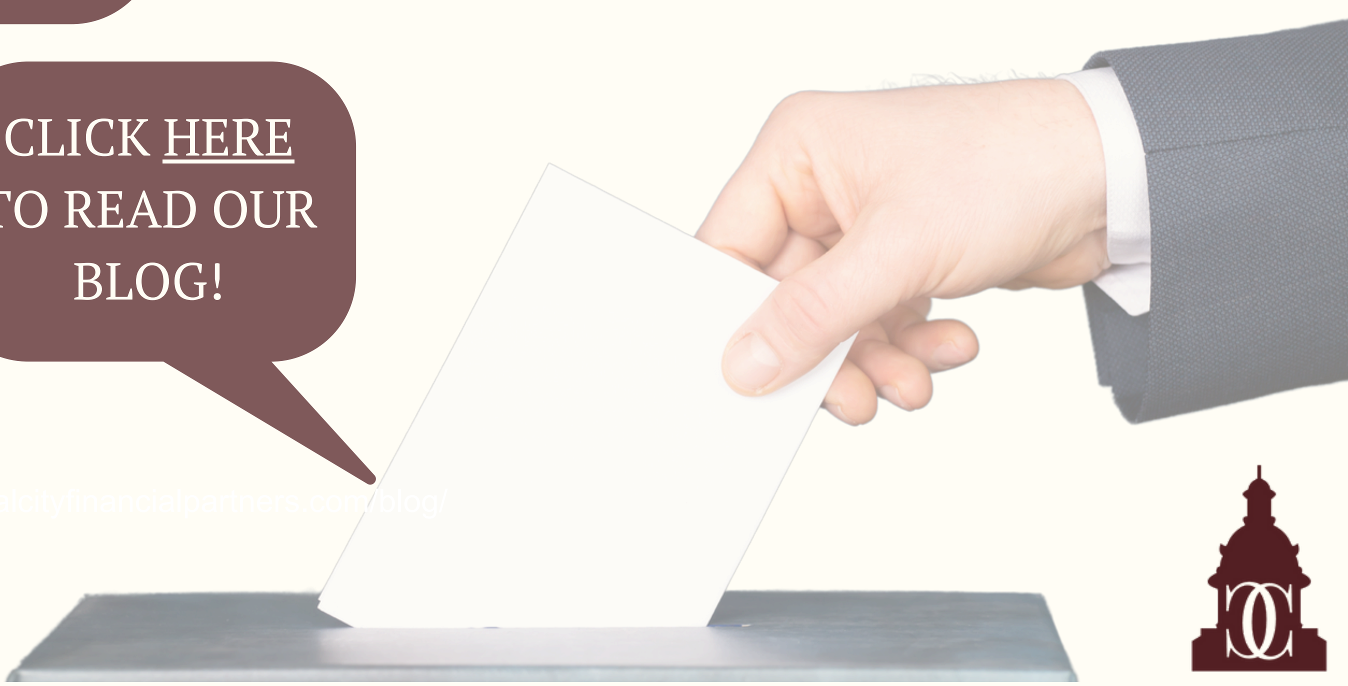
- Elder Fraud
- Common Schemes
- Protection Tactics
- How to Report Fraud

Learn how to protect your digital world with the Columbia FBI!

Thursday, August 22nd | 12:00 PM
Midlands Tech Beltline Campus: Center for Business and Information
Room 203

HOW WILL THE PRESIDENTIAL ELECTION AFFECT YOUR RETIREMENT?

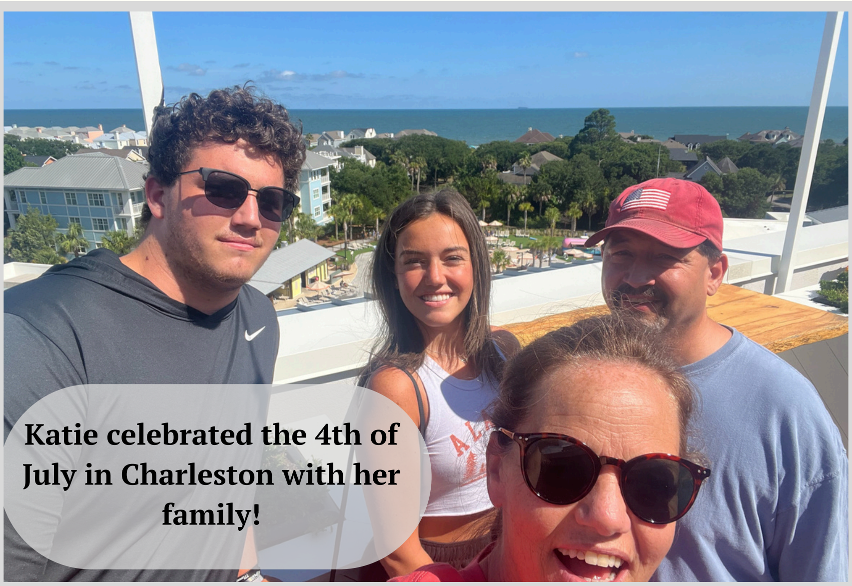
CLICK HERE TO READ OUR BLOG!



TEAM UPDATES


Here is Josh and his family traveling in Germany!


Michael Norris's baby boy, John, can now stand up and say "puppy" (his third word)!


Katie celebrated the 4th of July in Charleston with her family!


Merritt spent the day at a flower farm!

CAPITAL CITY FINANCIAL

AUGUST 2024

Stay connected with Capital City Financial Partners on social media!

Connect With Us

[Capital City Financial Partners]

@capitalcityfinancialpartne8493

www.capitalcityfinancialpartners.com

Capital City Financial Partners

@CapitalCityFP843