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SUNDAY STORIES

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B&H Wealth Strategies
1966 50 Years 2016

Roundtables provide valuable information in relaxed environment

By Katina Rose

B&H Wealth Strategies, celebrating 50 years in the financial planning business, is offering members of the community an opportunity to learn more about the services they provide in a relaxed atmosphere and open forum discussion group.

"How To Live and Retire Well" roundtable events are held throughout the year to provide potential clients with information, answer questions about retirement planning, and explain how B&H Wealth Strategies can assist with financial planning. They also provide resources on how to transition to a fulfilling retirement by promoting a healthy lifestyle.

Participants in the roundtable events are invited to listen and participate as Jeff Bingham, president of B&H Wealth Strategies, introduces himself and the members of his staff. He discusses the fundamentals of financial planning within his office and opens the floor for questions.

The staff members of B&H Wealth Strategies have a combined total of 50 years of experience, and are readily accessible during the evening to answer general questions. As Jeff mentions at the beginning of the event and anytime he talks about his business, his clients, along with his staff, become family. It's a regular routine for many of their clients to stop by the office to chat for a few minutes or grab a cup of coffee before taking a morning walk or running errands.

The small group setting of the roundtable events allows members to ask questions and sets the stage for a group discussion on a variety of topics related to financial planning and maintaining a healthy lifestyle. A few of the questions that may come up are: "How do I start planning now for my children or grandchildren's college expenses?" and "Will I receive a monthly statement about my accounts or can I go online to view them?"

Another common question that comes up during the roundtable event is: "Do I have enough money to last as long as I live?" Jeff and his staff will give priority appointments to everyone who attends one of the events, in order to review their current plan and assist in making future financial decisions.

The events are kept small in number so Jeff and his staff can answer all of the questions for the purpose of educating the attendees. Jeff makes it a priority to always provide educational information to his clients. Every appointment in his office allows them to leave with a little more knowledge of their retirement planning than what they had before.

Jeff's energetic and dynamic personality comes from his passion to develop meaningful relationships and his desire to enjoy life by helping others maintain their wealth, and lead a healthy lifestyle. He actively partners with community members in the healthcare field to provide a value added service for his clients.

"What can we do to help you improve your health? We focus on things that are balanced and disciplined. I have a passion and purpose about what I do every day and I want to share that with others," said Jeff.

Because of his own experiences, he continually interacts and helps his clients achieve their financial objectives. He is focused on making the transition to retirement lifestyle a successful and productive change by educating his clients about the services he provides. The roundtable events are just one way the staff at B&H Wealth Strategies reaches out to help others in the community.

B&H Wealth Strategies is located at 1402 East Center St. and parking is located behind the house. To make an appointment with Jeff, attend a future roundtable event or for further information, call 423-247-1152, email jeff@bhretire.com or view their website at www.bhretire.com. Follow them on Facebook at B&H Wealth Strategies, on Twitter at twitter@bhretire, and connect with the staff on LinkedIn.

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