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Celebrating 50 Years of Helping People Prepare for Retirement

By Katina Rose

B&H Wealth Strategies is celebrating 50 years of helping people prepare for retirement. They have been
assisting clients with financial goals longer than any other financial planning business in Northeast Tennessee.

Jeff Bingham, president of B&H Wealth Strategies, joined the firm in 1989. His father, Bob Bingham, and Norman Hensley founded the firm in 1966. The firm was originally named Bingham & Hensley and, in 2013, it became B&H Wealth Strategies to define the purpose of the business. It's never too early, or too late, to start planning for retirement and B&H Wealth Strategies has 50 years of experience to guide clients on a successful journey to meet their goals.

The initial meeting of a prospective client is considered the discovery process. "We want to know what the client wants and where they are headed. We listen to them, assist them in defining goals and provide clarity on how they can reach their objectives," said Bingham.

"Each person has an individual retirement lifestyle they want to achieve. After we carefully listen to them, we'll present it back to them to make sure we understand their goals. In the initial meeting, we also want them to feel comfortable asking us as many questions as we ask them. We are interested in listening to them so we can help them. We want this to be an educational process for the client. From the very beginning, and along the entire journey, we provide weekly information to keep our clients informed about current situations in the economy and how it may impact them. We filter the economic business 'noise' for our clients to provide them with the knowledge they need during turbulent times."

B&H Wealth Strategies operates on a core strategy, but provides tailored services to meet individual client needs. They use tools to visualize cash flow and will provide a path for what a client needs in order to retain a retirement lifestyle income. They will provide an income and financial stress test to assist them in discussing an individual income plan.

B&H Wealth Strategies has a rich history of helping multi-generational families reach their financial goals and is looking forward to continuing that tradition for many years to come.

Bingham said, "Listening and asking thoughtful questions to help you clarify your goals, implement financial solutions to achieve these goals, calm fears, and shine a light on any blind spots is our goal. It comes back to a simple idea that the only goal that matters to us, is your goals."

Along with helping clients achieve financial objectives, the staff is focused on making the transition to retirement lifestyle a successful and productive change. They host events and offer information on aging healthy and continually network with community organizations to provide clients with community resources. B&H Wealth Strategies considers this a value added service for their clients.

Along with Jeff Bingham, the office staff includes Sherry Bingham, the business manager/executive assistant; Nancy Stallard, senior associate; and Cathy Rhinehart, the marketing director. The staff holds a cumulative total of over 50 years experience in the financial industry.

B&H Wealth Strategies is located at 1402 East Center St. and parking is located behind the house. To make an appointment, 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 BH Wealth Strategies and connect with them on LinkedIn.

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