

## Did you know...

Only 43% of US non-retirees expect to retire comfortably?\*

43%

About 52% of Americans have enough life insurance? \*\*

52%

67% of Americans don't have a plan in place to protect their assets? \*\*\*

67%

\*<https://news.gallup.com/poll/506330/americans-outlook-retirement-worsened.aspx>

\*\*Life Insurance Statistics, Data and Industry Trends 2023 – Forbes Advisor

\*\*\*<https://www.legalzoom.com/articles/estate-planning-statistics>







PO Box 84  
Memphis, TN 38101-0084

Get personal financial  
planning advice  
to bring **your story**  
to life.

Let's find a way.



**You are the  
author of  
your story.**

Your goals.  
Your dreams.  
Your future.



As your Private Client Relationship Manager, I'm your point of contact for all your financial needs. Working with our financial specialty teams, including First Horizon Advisors, we never miss what matters to you.

Call me to schedule a conversation today.

<Insert PCRM First Name> <Insert PCRM Last Name>  
Private Client Relationship Manager

<Insert PCRM Email> | <Insert PCRM Phone>

Let's build a plan that puts  
you in **control.**



# Experience an approach that puts you first.

Like meeting a friend over a cup of coffee, our approach is based on human connection. An expert CERTIFIED FINANCIAL PLANNER™ professional will listen to your goals, dreams and objectives to provide you with straight answers and a clear plan, so you can live your financial story with confidence.

## Three ways we prioritize you.

- 1 One-on-one exploration**  
Our experts listen to your financial goals from a human perspective.
- 2 A highly personalized financial plan**  
Your goals drive the process for our recommendations.
- 3 A personal financial website**  
Take control with a site that connects all your financial positions, organizes your financial documents and helps you track the progress of your plan.



# Your next chapter starts with a conversation.

Our CERTIFIED FINANCIAL PLANNER™ professionals have earned one of the most rigorous certifications for financial planning knowledge and are held to a fiduciary standard, meaning they are obligated to act in your best interest.

Whether it's your first experience meeting with a financial planner or if you're looking for a second opinion on your current plan, we can't wait to help you write something beautiful –

## your story, your way.

**Call us at 844-901-3305 or visit [firsthorizon.com/planwithconfidence](https://firsthorizon.com/planwithconfidence) to schedule a conversation.**

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