Client Advisory Group

Please consider joining your fellow clients in an continual effort to gather information and feedback from you, our most valued partners.

We are creating an 8 person client advisory group to help facilitate the growth and services of our firm. It is intended to receive feedback about the issues most important to you as well as our own. We hope to get your thoughts, insights, and concerns regarding retirement, investing, and the services.

We initially plan on meeting 3 times a year at various venues, for 1 to 2 hours each time. We realize this can be a time commitment and there could be scheduling conflicts and not everyone would be able to attend all sessions. That is why we are asking for your best efforts if you decide to be a part of this program.

We hope this event and your participation in these group discussion will give us better insight into how we can better serve your financial needs.

No products or services will be offered, there will be no sales pitches, we merely ask that you come prepared to discuss what you see and what you might want to see differently within the

Refreshments Will be Served

Call 855-272-7779 or info@brassringwealth.com to join.

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