Frequently Asked Questions (FAQs)

Are you retiring? Absolutely ***not***! This is an opportunity for me to continue to service my existing (and new clients) without many of the administrative and regulatory burdens that have been extremely time-consuming. . . and to give me a "deeper team-bench".

Is Edna staying on board? – Absolutely!

Will you still be in the same location? – Yes, our location will not change, although you will soon see a new sign outside!

Will my relationship with Charles Schwab change? No, there will be no changes to your custodial relationship with Schwab. Account numbers will remain the same; all standing instructions / access will remain in force once transition paperwork has been completed. Following the completion of this transition paperwork, Schwab will acknowledge the change.

Will you be taking new clients? Yes, we continue to welcome new clients!

Will my fees change? For transition purposes, the billing of your accounts will gradually shift from our current billing schedule, which is Monthly in arrears (covering the previous month) . . to billing Monthly in advance and then to Quarterly in advance after the first of the year. Your advisory fees themselves will not change.

What will your firm be called? OneAscent Wealth Management

Who is OneAscent Wealth? OneAscent is a Registered Investment Advisor headquartered in Birmingham, AL with affiliated advisors throughout the United States. For us, they will be providing access to additional investment opportunities, a robust technology package, trading platform, and compliance oversight.

What is Adhesion Wealth? Adhesion is a new trading platform that will be used in the future and will be reflected as a manager on your paperwork.

How long will this transition take? We will begin processing the necessary paperwork in mid-August. The transition is expected to be completed by the end of the year.

What happens next? You will receive a packet of regulatory disclosure documents for OneAscent Wealth (similar to what you are accustomed to receiving from me each spring.) Those documents will be informational only, with no action required on your part. ***Then, our office will be in touch over the next few weeks to make*** arrangements for completing the necessary paperwork and to answer any questions you may have.

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