



Our New Service Team is Here to Assist You!

At Keystone Financial Partners, we are your financial coaches, helping you to manage the long-term decisions that will ultimately determine the wealth that you accumulate and preserve. We are always ready to address your concerns and answer your questions.

With these goals in mind, Jim Trull is proud to announce two new additions to our team:

Christopher Walsh, Financial Planning Assistant, joined our team in April 2010, replacing Karen whom left to start a family. He comes to us with over five years of investment experience as a Financial Specialist. As an Assistant, Chris' main focus is working with our clients. He is here to answer your questions.



Chris earned his Bachelors of Science degree in Business Administration with concentrations in Finance and Financial Planning from The College of Saint Rose in Albany, NY. He started his career with Empire Asset Management Group, a private wealth management firm located in Albany, NY. As a Financial Specialist he assisted clients with a magnitude of issues and enjoyed working one on one with clients. He is currently working towards his Series 7 and 66 registrations with Commonwealth Financial Network. He also plans to pursue the CERTIFIED FINANCIAL PLANNER™ certification in the near future.

Contact Chris at 919-463-0018, ext. 103 or cwalsh@keystonefinancialpartners.com.



Tami Hollingsworth, Client Service Assistant, has been with us since November 2009, so you may have already met or talked with her on the phone. As your first contact with our company, Tami will assist you with your questions while managing our daily business operations.

Tami earned her Bachelors of Science degree in Economics from North Carolina State University and has over 14 years experience in the financial services industry. She started her career with CDA/Wiesenberg, a mutual fund research company that provides software to financial advisors and brokers. Progressing, Tami worked over 11 years for a small mutual fund company. During her tenure there, she earned her Series 6 and 63 registrations, as well her Chartered Mutual Fund Counselor designation. She now plans to get re-registered with her Series 6 and 63 registrations with Commonwealth Financial Network.

Contact Tami at 919-463-0018, ext. 100 or thollingsworth@keystonefinancialpartners.com.

**We're here to serve you. Please don't hesitate to call
if you need anything regarding your accounts.**