

BEST INVESTMENT FIRM & BEST FINANCIAL PLANNERS

Niles P. Geary, II and Suzanne Donaldson

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Life is all about the journey. Niles P. Geary, II and Suzanne Donaldson, co-founders of Voyage Partners Financial Strategies, LLC, can attest to that both personally and professionally.

Niles, company CEO, originally hails from Washington D.C. He came to Johnson City in 2004 as a part of a management change at Cariten Healthcare where he served as the Chief Financial Officer (CFO). In 2007, he earned his MBA from King College and, a year later when Cariten Healthcare was sold, he made the decision to change careers and began working at Wells Fargo Advisors.

Originally from Memphis, Suzanne, company president, graduated from Rhodes College and began her career in the Trust Department of First Tennessee Bank before transferring to the Johnson City branch in 1979. Suzanne was a vice president and senior trust officer at the bank with the Certified Employee Benefit Specialist (CEBS) designation. After 33 years, she took early retirement and began a second career at A.G. Edwards and Sons, which later became Wells Fargo Advisors, where she completed her Certified Financial Planner™ (CFP®) designation.

"I had been looking for someone I could partner with, who was younger," Suzanne said. "After I got to know Niles, he was the first advisor I found who I could trust with my clients who had been with me since the early 80s."

They started Voyage Partners Financial

Strategies, LLC, in May 2012. Its name derived from a booklet Niles had written two years earlier called "How to Weather Life's Storms and Live the Life You Envision."

"I was surprised people would trust me with their life savings without knowing my own personal philosophy on managing money, so I wrote the book to explain my philosophy. And Suzanne's philosophy was just like mine," Niles said. "We're a good pairing."

In the booklet, he compares a person's financial journey with an ocean voyage where the final destination is known, but perhaps the route hasn't been decided. Each person's financial plan is the boat they'd need for their individual voyage. Along the way, storms come.

"Some storms are big, some are little, but they get water in your boat," explained Niles, a Chartered Retirement Planning Counselor (CRPC). "We want to help our clients build their boat based on where they want to go and teach them how to weather the storms."

Voyage Partners Financial Strategies, LLC, serves clients in nine different states, and they know all of their clients personally.

"If you ask our clients the name of our company, they probably couldn't tell you," Niles said. "They know Niles, and they know Suzanne."

The company hosts events for their cli-



NILES P. GEARY, II AND SUZANNE DONALDSON, CO-FOUNDERS OF VOYAGE PARTNERS FINANCIAL STRATEGIES, LLC

ents where no business is discussed, just to get to know each other better. This year, they held their second annual picnic. They also received good feedback from clients who attended a wine tasting event where a wine expert discussed how to pair specific wines with certain foods. Several educational seminars are also held to provide customers with added financial information.

"We recognize that clients are tired of being sold to, so our philosophy is unique," Niles said. "As opposed to marketing gimmicks, we focus our time and efforts on helping clients get crystal clear on their goals. Then we assist them in understanding the challenges their current situation presents, followed by identifying the opportunities to strengthen their ability to meet their objectives. We do that by focusing on the

four P's: Proper Planning Provides Peace in our five-step process during our client wealth inspection."

Voyage Partners Financial Strategies, LLC, takes a holistic approach concerning finances, recognizing that as people age their financial goals change, from getting out of debt to providing for their children in case of a catastrophe and from planning for retirement to caring for elderly parents. Services include financial planning, investment management, insurance (risk management), and estate planning.

Voyage Partners Financial Strategies, LLC, won first place in the Reader's Choice Award categories for both Best Financial Planner and Best Investment Firm. Business hours are Monday through Friday from 9 a.m. to 5 p.m. For more information, visit www.voyagepartnersfinancial.com

VOYAGE PARTNERS FINANCIAL STRATEGIES, LLC



Niles P. Geary, II, MBA CRPC, Co-Founder & CEO

Shannon Childress, Operations Specialist

Suzanne T. Donaldson, CFP®, CEBS, Co-Founder & President

Thank You ...

We want to thank all of our clients for voting us as both the Best Financial Planner and the Best Investment Firm.

We recognize that without our clients none of this is possible. We greatly appreciate all of you. For those of you that don't work with us, come and see why we are the People's Choice Award winners.

The Custom Wealth Voyage

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It's time; let's chart your financial future together.

