

BUSINESS LEADER.

Who's Who

IN NASHVILLE &
WILLIAMSON COUNTY

MAGAZINE

SPRING/SUMMER 2011



Leaders in Nashville's Business to Business Scene

L-R: Carl Haley Jr., Grand Avenue Chauffeured Transportation; Jeff Roberts - Griffith & Roberts, PLLC; Joe Budd CFP® ChFC® - Budd, Melone & Co. Financial Consulting Group; Keely Hall - FirstBank, Brentwood; Adam Duncan - GetMyFavs.com; Courtney Hammons - A Magical Affair; Mark Filaroski - CompNation Computer Supply, LLC; Gary Luffman - Hiscall, Inc.

FEATURES

A Magical Affair
Avatar Software, LLC
Beckwith Interiors
Brentwood Home Page
Budd, Melone & Co. Financial Consulting Group
CompNation Computer Supply, LLC
Curtis Financial Group
Donnelly Timmons & Associates, Inc.
Elite Properties, LLC
FirstBank, Brentwood - Keely Hall

GetMyFavs.com
Griffith & Roberts, PLLC
Grand Avenue Chauffeured Transportation
Hiller Plumbing, Heating & Cooling
Hiscall, Inc.
Indian Lake Medical Weight Loss
and Wellness, PLLC
INSIGHT architecture
Joseph P. Wiggs, D.D.S.
Maryland Farms Chiropractic

PrimeLending, A PlainsCapital Company
Richard Sullivan, III, D.D.S., FICAI, FIAD
Shipley Capital Advisory, LLC
Sign-A-Rama - Franklin
Sun Medical Express Walk-In Clinic
Tim Leeper Roofing
W. Scott West, M.D.
Yogi Salon and Neighbors of Sylvan Park

Enter to Win

CROWN
CARPET CLEANING

One house up to 1000 sq ft
of carpet cleaned
(\$500 value)

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Budd, Melone & Co. Financial Consulting Group

“Planning for Your Financial Journey”

Photo by Sheri O'Neal Photography



Joseph G. Budd, CFP®, ChFC®, Managing Partner

Life is a journey ... have a plan. Planning is the focus that Joseph Budd and Lou Melone, co-founders and Managing Partners of Budd, Melone & Co. Financial Consulting Group, have embraced since starting their careers in the financial advisory industry 15 years ago. They obtained their CERTIFIED FINANCIAL PLANNER™ designations in 2002 and studied at the American College in Bryn Mawr, PA for the CFP® curriculum. From the beginning, they witnessed an industry that was all too often product driven rather than planning driven. Their relationships with their clients are based on a holistic planning approach that revolves

around the client’s objectives and goals.

Budd, Melone & Co. utilizes the six step planning process established by the CERTIFIED FINANCIAL PLANNER™ Board of Standards. After a thorough discussion with the client regarding their situation, they do an analysis of the client’s financial strengths and weaknesses. Joe and Lou prefer to focus on a fee-based investment management approach, rather than a commission-based approach, while utilizing investments that have full liquidity.

Clients of Budd, Melone & Co. stay organized by taking advantage of the firm’s wealth organizer that has been

developed over the course of the last decade. “We understand that business owners and individuals are busy, and being able to organize a client’s entire financial life has been a huge benefit for them and for our ability to update their plans,” states Joe.

Joe and Lou have been servicing clients who have relocated from the Midwest to the Southeast for the last decade. “We saw the need to maintain our client relationships on a more local basis, and it has been a great diversification for our practice as well,” Joe explains. The firm has clients in more than a dozen states and has maintained those relationships through travel and technology. They work with their client’s CPA and Attorney to help in tax planning and implementing the client’s estate plan as well. “Having ongoing communication with the client’s key advisors is critical to having a complete relationship with the client,” says Lou.

Budd, Melone & Co.’s Cup of Coffee and Second Opinion program has helped them continue to grow. “By offering a no-obligation meeting to the prospective client and showing them our planning-driven approach, they have quite an eye opening experience regarding their finances,” states Joe. ☺

BM BUDD, MELONE & COMPANY
FINANCIAL CONSULTING GROUP

Call Budd, Melone & Co., for your cup of coffee and a second opinion at 877-293-5830. Their Cool Springs office is located at 725 Cool Springs Blvd., Suite 600, in Franklin.

Joseph Budd and Louis Melone are Managing Partners and CERTIFIED FINANCIAL PLANNER™ professionals with Budd, Melone & Co. Financial Consulting Group. Wells Fargo Advisors Financial Network did not assist in the preparation of this report, and its accuracy and completeness are not guaranteed. The opinions expressed in this report are those of the author(s) and are not necessarily those of Wells Fargo Advisors Financial Network or its affiliates. The material has been prepared or is distributed solely for information purposes and is not a solicitation or any offer to buy any security or instrument or to participate in any trading strategy. Fee based investment management may not be suitable for all investors.

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