



## Your Wealth Management Team

### WORKING TOGETHER FOR YOU

When you work with our Fiduciary advisors in an advisory relationship, you gain the strength of a community of professionals with the support of a diverse team of financial planning leaders. Our Fiduciary advisors can orchestrate a customized plan, tailored to your situation.

Please contact any advisor of our team at 901-683-4030 for an initial conversation regarding how Roop Financial Services may customize a wealth management strategy to suit your needs.



**Joshua Murphey**  
Financial Advisor

**Walter Roop, CLU**  
Senior Wealth Advisor

**Richard Fisher, CLU, ChFC, CFP**  
Senior Wealth Advisor

We're a financial planning firm, but we like to talk more about relationships than we do money. After completion of your initial plan, we'll work closely with you throughout our relationship. Typical areas in which we provide ongoing advice are:

- Annual portfolio withdrawal strategies
- Roth conversions
- Establishing when to claim Social Security
- Selecting pension payment types
- Transferring and/or consolidating investment accounts
- Reallocating investment portfolios
- Determining health insurance options
- Establishing a spending plan
- Consolidating debt
- Amending insurance coverage
- Updating estate documents and beneficiary forms

Financial planning is a process, not a product. It's a close ongoing relationship between you and us involving regular meetings, webinars, calls, e-mails, etc. The ultimate goal is for us to help you make the best possible decisions around your finances to allow you to live your best possible retirement!

We'll typically have two formal meetings per year to update your plan, refine your portfolio withdrawal strategy, determine each year's tax planning objectives and actions, review estate plans and wishes, discuss any questions you have, etc. While the goal is to have the two official meetings each year, you're not limited to only working with us every six months... we're here for you as life happens! We're accessible by meeting, phone, e-mail or video conference as life unfolds and financial decisions need to be made.

#### Compensation Method

Assets Under Management fees, hourly fees;  
Commissions (Insurance Products)

#### Professional Services Provided

Comprehensive wealth management services, investment advisory services, financial planning services, Social Security planning, employee benefit planning, estate planning analysis and tax-reduction strategies

**9061 Stone Walk Place • Germantown, TN 38138 • Office: (901) 683-4030 • [www.roopfinancial.com](http://www.roopfinancial.com)**

\*Securities and advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC.



### **Walter Roop, CLU** **Senior Wealth Advisor**

My 30 years background in the industry has given me a broad understanding of the unique challenges that individuals and businesses face when it comes to financial planning. I graduated from the University of Memphis with a degree in business and earned the Chartered Life Underwriter certification from the American College. As a Fiduciary advisor for my advisory client relationships, I use the LPL research

and Model Wealth Portfolios investment platform to build comprehensive investment strategies focused on my clients' unique objectives, risk tolerance, timeline and goals. I provide personal consultation, monitor your plan investment performance on an ongoing basis. I take pride in my ability leverage my knowledge of markets, asset allocation, and portfolio construction to help ensure the models are working for you.

I love my work and believe in developing long-lasting relationships with my clients and acting as a trusted guide through their financial journeys. I'm especially interested in engaging clients helping them plan for their retirement income and lifestyle protection.

Outside of work, my family is my heart and passion. I grew up in Memphis and now reside in Germantown, TN with my wife Cindy. We have small farm in Hernando, MS where we spend most our time enjoying the outdoors, growing blueberries, blackberries, and apples. We have been blessed with 2 children that are married.

*"Securities Licenses held through LPL Financial; 6, 63, and 65"*



### **Richard Fisher, CLU, CHFC, CFP** **Senior Wealth Advisor**

I joined Roop Financial Services in 2007. With the knowledge I have gained during my 30+ years of experience of working with people in the Mid-South area, I am positioned to help my clients work towards financial independence. I work with financially successful people who want professional guidance in preserving and growing their wealth. As a Fiduciary advisor for my advisory client

relationships, I use the LPL research and Model Wealth Portfolios investment platform to build comprehensive investment strategies focused on my clients unique objectives, risk tolerance, timeline and goals. I believe in developing a close personal relationship with each special planning client so I can understand their values, goals and interests.

My areas of expertise are Wealth Management Strategies, Retirement Income Planning, Long term care planning, Strategies to Maximize Social Security Benefits. I earned a B.S. Degree in Business Administration, University of Tennessee and my professional affiliations are with The Financial Planning Association of Memphis and am an active Member of Lindenwood Christian Church.

My personal life is centered around on my family, daughter, grandchildren, church, and friends. I enjoy my chosen career and strive to treat everyone I deal with professionally and give them the same advice I would give someone who is in my close personal circle of friends. My hobbies are canoeing, white water rafting, and duck hunting and working in my yard and around the house.

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### **Joshua Murphey** **Financial Advisor**

I joined the Roop Financial Services team in January 2024. I have eleven years of industry experience and five years in financial planning. As a Fiduciary advisor for my advisory client relationships, I use the LPL research and Model Wealth Portfolios investment platform to build comprehensive investment strategies focused on my clients unique objectives, risk tolerance, timeline and goals. I'm not only

focused on guiding my clients with their personal finances but on serving business owners and their unique financial needs as well. For personal financing, I take a comprehensive approach to financial strategies and helps identify opportunities to help manage cashflow, organize finances, retirement planning, wealth management, and generational wealth strategies. For businesses, I help clients with small business retirement plans, properly funding buy/sell agreements, and succession planning.

Born and raised in Brandon, Mississippi, Josh, his wife, Stephanie, and their two children have called Collierville, Tennessee home since 2010. Josh has served as a volunteer soccer coach with the Collierville Soccer Association, a board member for Rossville Christian Academy, and enjoys Brazilian Jui Jitsu, fishing, and hunting. The Murphey's like to stay active and love to regularly go on mission trips to South America and Abaco, Bahamas. They lead the junior and senior students on a mission trip at the end of each school year.

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