

# CarrThaxton Financial Group

## **Scott E. Thaxton, JD, CRPC**

- Wealth Advisor
  - Financial Planning
  - Investment Management

## **Greg J. Pennini, CFS**

- Wealth Advisor
  - Financial Planning
  - Investment Management
  - Client Reviews

## **Matthew V. Fletcher**

- Wealth Advisor
  - Financial Planning
  - Investment Management
  - Client Reviews

## **Mary Jo Blackwood**

- Client Service Associate
  - New account set up
  - Ongoing account service
  - Fund Transfers
- Financial Planning Assistant
  - E-Money system management

## **Connie Grady**

- Client Service Associate
  - Annuity and Insurance Applications & On-going service
  - New account set-up & On-going service
- Director of Operations
  - Handles inter-office matters

## **Beverly Ekstrom**

- Administrative Receptionist
  - Client appointment scheduling
  - Handles client contact system
  - Purchases all office supplies
  - Office Bookkeeping
  - Coordinates Client Events & Seminars
  - Coordinates all office mailings