

Casey Mullooly: In episode 289, we've got a big announcement.

Casey Mullooly: Welcome back to the Mullooly Asset Show. This is episode 289 and I'm your host, Casey Mullooly, but I'm going to be making way in just a short while because it's been a big week here at Mullooly Asset Management, and another member of the team is going to join me to talk about why it's been a big week. So Tim, why don't you come on in here?

Tim: Thanks, Case. Hey everybody, it's Tim. It's been a while since I've been on a video. But as of this morning, I am officially a CFP. CFP stands for Certified Financial Planner. Becoming a CFP has been a goal of mine for a long time now. So I'm super excited to finally have that under my belt and be able to start putting that to use for the people watching here, clients and potential new clients in the future.

Tim: Throughout the CFP process, we covered a lot of topics, retirement planning, tax planning, investments, insurance, college planning, debt management, you name it, we covered it. Anything that goes into a full, comprehensive plan, we study that throughout the process for our clients. You know that we lead with planning here at Mullooly Asset Management. So being a CFP, having that designation is extremely important because it goes hand in hand with everything that we do here as a firm. And it really, it'll help me be a better advisor and a better planner to the clients now and in the future. I'm super excited to be able to contribute more to our team approach here at Mullooly Asset Management. And again, just very excited to get going on this journey of being a Certified Financial Planner. So thanks for having me on the show, short and sweet. And let's get to work.

Casey Mullooly: So we now have three CFPs on board here at Mullooly Asset Management, three Certified Financial Planners. Just wanted to give a huge congratulations to Tim. I know how hard he worked pouring over the textbooks, doing the practice quizzes, all the late nights here at the office. It was really inspiring to see all the hard work that he put in to better serve our clients and just everyone in the financial industry as well. CFP is one of the highest designations that you can have in our industry. So we're very proud of Tim, super excited to see where he goes as a professional and what he does for our firm and for our clients. So three CFPs, I'm not there yet. I would be the fourth. Maybe one day, I'll get there. But for now, that's going to wrap it up for episode 289. Thanks as always for tuning in and we'll be back with you for 290.