



TWO HEADS ARE BETTER THAN ONE

Interline Financial Advisors, Inc. provides clients with truly interconnected expertise.

“We help our clients put the uncertainty aside by providing a truly ‘interlinked’ approach,” says Gayle Meeks, RFC[®], financial advisor, cofounder, and vice president of Interline Financial Advisors, Inc. “We bring together an entire team of advisors in investment planning, estate planning, tax-reduction strategies, insurance, and other resources to create a complete plan for our clients’ financial futures.”

With husband Steve Meeks, RFC[®], CCFS[®], financial advisor, cofounder, and president, Gayle and the Interline team

focus not just on delivering a rate of return for their clients’ portfolios. Their clients tend to be less interested in seeing huge investment growth and more focused on income stability that meets their long-term retirement goals.

“We work with families that are in the ‘retirement red zone,’ meaning five years before and after retirement begins,” says Steve. “We find that clients often have components of their retirement plans scattered across different advisors, and those financial professionals often aren’t talking to each other. We bring all of those elements together.”

As fiduciaries, the firm acts in clients’ best interests, whether helping an

individual plan for retirement or providing planning advice to business owners, a group that often faces huge annual tax burdens. “We can help clients prepare ‘tax forward’ strategies for these events,” Gayle says. “We provide tools that allow them to shore up their financial plans and protect their assets and investments as much as possible, from both inflation and taxes.”

Working With a Married Team

One of the advantages of being a married financial advisory team, Gayle says, is having a shared perspective with clients. Many of them are married couples with families, and they are primarily interested in planning for a near-future retirement.

“We’re a married couple that is going through many of the same life experiences as our clients,” Gayle says. “We want to make sure that they have everything they need to live the lifestyle that they want in their retirement. Plus, you’re getting two advisors for the price of one.”

Another advantage is having two expert perspectives on the same issues and challenges. That’s especially valuable in today’s volatile market, where even the most well-established strategies can fail without stress testing and contingency planning.

“Gayle and I can experience the same moment, and yet we see it from totally different perspectives,” Steve says. “This allows us to create a comprehensive plan that covers a variety of potential challenges and outcomes.”

For the Interline team, the end goal couldn’t be clearer. “Clients come into our office tense and stressed,” Steve says. “They say, ‘Here’s everything that my family has. We need it to last. Please don’t let us down.’ That’s a very serious thing. While no financial plan is bulletproof, we build comprehensive strategies that put the odds in their favor as much as possible.”



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