Cheryl Hooks Mission Statement

My goal at Way Financial Group is to help you and your family to realize your future financial dreams ("life goals") through prudent investment management techniques. I can help you develop your portfolio to earn realistic returns over time based on your "life goals".

Remember that my first goal is to help you meet your financial objectives.   This is best accomplished in a non-product related environment.

The following is an overview of the steps involved to develop your customized plan portfolio:

1. Discovery Interview (determine "true life goals")
2. Current Plan Analysis (see how far you have already come on your path towards your defined "life goals"
3. Plan Development
4. Client's Acceptance
5. Plan Implementation
6. Periodic Review, to confirm we are staying on track

Potential Investment Options

- Simplified Employee Pension (SEP)
- Simple IRA – IRA Rollovers
- Mutual Funds
- Stocks
- CD's
- Bonds
- College Planning (529 plans)
- Fixed or Variable Annuities
- Banking – Mortgage
- REITs'
- Disability Insurance, Life Insurance

(Securities offered through Triad Advisors, member FINRA/SIPC)

About Me

With more than 15 years in the financial industry, I am committed to learning the individual needs of my clients and providing them with the trusted advice and world class service for long term relationships. Thank you for your consideration of my services. Please call me anytime with any questions @ 803-802-5244 or 770-722-1298. I stand ready to assist you in reaching your financial independence you desire.

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