



Erica Martin

Client Onboarding Supervisor

Erica Martin is the Client Onboarding Supervisor for Henssler Financial. Her primary responsibility is handling new clients from the start of their relationship with our firm until their accounts are open and funding is in progress. She then transitions the client to the Financial Planner who works with the client's primary Associate. Additionally, Ms. Martin, assists the Operations department with many of our new client initiatives. She also continues to support our Associates and their teams in the servicing our existing clients as needed.

Ms. Martin joined the firm in January 2016 as a Client Service Associate supporting the firm's Financial Planners and Associates. She then transitioned into the Financial Planner role where she assisted in the running of client cash flow projections, processing client information and client services support duties. Her experience with our firm created a great foundation and was a key factor into her transition to the Client Onboarding Supervisor position.

Prior to joining the firm, Ms. Martin spent nearly seven years in the restaurant service industry, advancing to General Manager. Her responsibilities included coordinating inventory control initiatives, handling bookkeeping and account reconciliation, and enhancing customer loyalty by ensuring exceptional service.

Ms. Martin earned a Bachelor of Arts in French Studies from Kennesaw State University and is fluent in French.



*8 Years of Financial
Services Experience*

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Henssler Financial is a financial planning and money management firm with assets under advisement of more than \$3 billion as of December 31, 2023. Henssler Financial, which includes federally registered investment adviser G.W. Henssler & Associates, Ltd. and is headquartered in Kennesaw, Georgia, a suburb of Atlanta.

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