



Lydia Ricketts

Financial Planner

Lydia Ricketts is a Financial Planner in the Planning & Implementation Department. Her responsibilities include assisting Managing Associate Jarrett McKenzie, CFP®, CWS®, and Associate Clay Norman, CFP®, reviewing client asset allocation and cash flow projections, developing client investment policy statements, and client services support duties.

Ms. Ricketts joined Henssler Financial in September 2022 as a Client Service Associate, assisting Associates and Financial Planners with meeting preparation, compiling accurate client review data, and addressing client concerns.

As a Financial Planner, Ms. Ricketts is responsible for assisting the Associates in rebalancing accounts, opening and closing of accounts with custodians, monitoring cash flows, and compiling accurate client review data.

Before joining the firm, Ms. Ricketts was a Substitute Teacher, with the Cobb County School District, supervising students and interpreting lesson plans by following procedures and achieving lesson goals for absent teachers.

Ms. Ricketts earned a Bachelor of Business Administration in Economics and Finance from Kennesaw State University and is currently pursuing a Masters in Business Administration from Kennesaw State.



*1 Year of Financial
Services Experience*

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