



Sam Aldridge, CFP® Financial Planner

Sam Aldridge, CFP®, joined Henssler Financial in January 2021 as an Intern in the Planning & Implementation Department. She accepted a full-time position as a Client Service Associate in May 2021. In January 2022, she was promoted to Financial Planner where she assists Managing Associate K.C. Smith, CFP®, CEPA, and Senior Associate Logan Daniel, CFP®, CRPC®, with preparing and reviewing client asset allocation, client cash flow projections, processing client information, and client services support duties.

As a Financial Planner, Ms. Aldridge 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. Ms. Aldridge also assists with training new cohorts of interns.

Prior to joining the firm, Ms. Aldridge was a Parking and Transportation Student Worker at Georgia College & State University, assisting students, staff, and visitors with parking and transportation services on campus. She also worked as a Financial Reporting Intern at Voya Financial.

Ms. Aldridge earned her Bachelor of Business Administration in Accounting from Georgia College & State University. She is a CERTIFIED FINANCIAL PLANNER™ certificant.



*CERTIFIED FINANCIAL
PLANNER™ Certificant*

*3 Years of Financial
Services Experience*

*Member of Financial
Planning Association*

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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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