



Top Talents

By James Richardson. Photography courtesy of Lee Pierce and stockrockandroll.com

“Save when you can, spend less than you make, save the rest, and be patient. And work with a financial advisor.”

That is good advice which comes from a seasoned, and nationally-recognized, financial advisor. Lee Pierce of Pierce Financial was named to the Financial Times 2016 Top 401 Retirement Plan Advisors List. As a matter of fact, this is two years running that he was named to this list. He was selected from nearly 650 qualified advisors around the country.

According to the selection criteria by the Financial Times, “To qualify for the list, advisors had to have 20 percent or more of their total client assets in DC (defined contribution) plans. Qualified advisers were then graded based on seven broad factors: DC assets under management, growth in DC plans and assets, degree of specialization in the DC business, experience, and participation rate in DC plans advised, industry certifications, and compliance record. The Financial Times Top 401 Retirement Plan Advisors is an independent listing produced by the Financial Times. The award is based on data gathered from financial advisors, firms, regulatory disclosures, and the Financial Times’ research.”

As Pierce explained, “The award is issued by an international financial publication called the Financial Times.”

It is a daily publication geared to those in the investment and financial services industry. The award, which began in 2015, is to identify top 401K advisors across the country. “I have been honored to be the recipient of it in both years and also honored to be the only advisor in this metropolitan area to receive the award.”

Pierce is the founder and president of Pierce Financial. He has nearly 20 years of financial services experience. “I started this business 17 years ago in 2000. I am a non-practicing CPA (Certified Public Accountant) but I keep my license active because it certainly benefits me in my business and retirement planning, but I do not practice accounting, and have not in many, many years. I also have an accreditation called the AIF (Accredited Investment Fiduciary), which is a designation geared for those financial professionals that are advising in the 401K and retirement planning arena.

“My education comes from the University of Tennessee at Martin, where I received a bachelor of business administration in accounting and a minor in agriculture business. I grew up in Dyersburg, Tennessee, and attended



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college in Martin. I came to the Memphis area in 1988, and started my career in public accounting with an international CPA firm called BDO. I was only in public accounting for three years and then wound up in DeSoto County as the chief financial officer of a manufacturing company called Stylecraft Lamps. Then I started Pierce Financial in 2000."

The services at Pierce Financial are to manage investments for individuals and businesses and to help employers sponsor qualified retirement plans. Their goal is to help individuals reach their individual investment objectives through their specialized process based on knowledge and experience. Pierce Financial is a member of Retirement Plan Advisory Group (RPAG), and has offices in Hernando and Memphis.

Pierce has received other various industry awards over the years. "I'm frequently invited by organizations to speak to their membership mainly on the topics of retirement planning and fiduciary responsibilities. I've been a frequent speaker to the Tennessee Society of CPAs and the Tennessee Labor Development Workshop." Pierce "is passionate about serving others and believes in the importance of viewing each individual's situation as if it were my own. This philosophy promotes a higher level of understanding with my clients and assists me in helping to meet their unique needs. I am blessed and humbled to receive such an award and be considered as one of the elite retirement plan advisors in the country. I thank God, and express my sincere appreciation to my clients that have placed their trust and confidence in me and my firm. They made this happen."

So, when an accomplished and respected financial advisor gives information and advice, take it. His advice: "The general rule is to save when one can, spend less than you make, save the rest, and be patient, and work with an advisor, not a salesman. Advisors normally work on a fee basis as opposed to a commission basis. A salesman is earning a commission based on a transaction, whereas an advisory relationship, I'd say, is similar to a relationship with your personal physician or an attorney. You pay them for their time based on their knowledge and expertise." piercefinancial.org



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