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Women Who Lead | Financial Planning: Ashley Remmers of Diversified Trust, Kathleen Fish of Fish and Associates, Tee Meeks of Waddell & Associates LLC

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If there ever was a time for leadership, the pandemic era has been that occasion. And in uncertain monetary times, financial planning industry executives have provided guidance to individual portfolios as well as to their own firms, which haven't been immune to the effects of COVID-19.

For Memphis Business Journal's next group of Women Who Lead, honoring professionals within the financial planning arena seemed to be another logical choice. Also logical is highlighting the accomplishments of women who have broken through the glass ceiling and helped define their organizations.

Each woman chosen by MBJ's editorial team has qualities that define leadership — from pushing through challenges and moving individual and organizational financial goals forward in difficult times to career-altering decision-making.

Within the financial planning industry, the nine Women Who Lead honorees are providing leadership at some of the area's most valued financial institutions. From creating financial plans for individual investors to guiding administrative roles within those organizations, this group of Women Who Lead are trusted advisers, who make each of their respective companies holistically balanced.

The Women Who Lead feature, which began in 2021 and continues throughout 2022, has been an ongoing monthly feature in MBJ and is sponsored by Simmons Bank. This year, the section will highlight industry leaders in construction, medical devices, residential real estate, and technology, among others. – *Jason Bolton, Managing editor*



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Ashley Remmers, principal,
executive relationship manager,
Diversified Trust

Ashley Remmers

Principal, executive relationship manager, Diversified Trust

With 44 years in the industry, 22 of which are with Diversified Trust, Ashley Remmers is a “highly experienced relationship professional.” She works with a team of client service professionals providing wealth management, family office, advisory, and trust services.

Remmers also generates new client relationships and provides strategic oversight for those relationships. And, she specializes in being a resource for clients with closely held businesses. Her biggest career achievement involves working with second- and third-generation members of client families to sustain their wealth and their businesses. Another is launching Diversified Trust's private equity strategy.

As for her next big goal, she's focused on "growing a professional staff to meet the needs of a growing client base while maintaining the current culture of excellence and generosity at Diversified Trust."

Quotable:

An industry trend Ashley Remmers sees is the "consolidation of firms so that clients can receive comprehensive family wealth services from a single provider. Diversified Trust was founded as a chartered trust company and is organized and equipped to deliver those comprehensive services to its clients."

Kathleen Fish

President, Fish and Associates

Who runs the world? Girls! Or in the case of an all-female financial planning and wealth management firm, women!

At their firm, Fish and Associates, Kathleen Fish and her business partner, Kerry Jackson, strive to empower women to make wise and confident financial decisions to secure their future.

Fish is also focused on continuing to grow her firm and bring more women financial planners into the industry. A trend she sees is "the expectation that clients want a more personalized experience with their financial advisor," she said. "People no longer want just investment advice; they want a deeper and more personal involvement in all financial decisions."

She also sees an industrywide drive to bring more women into the field. Only about 23% of all certified financial planners are women, up from about 10% when Fish began in the industry more than 30 years ago. "We have a way to go, and it is a great career for women."

Quotable:

Kathleen Fish's biggest career achievement is "building a firm from the ground up that seeks to bring women into a career and industry that's been significantly and historically under-represented by women. Bringing my daughter Kerry into this

business and having both the opportunity and privilege to mentor her over the past 13 years is an achievement I'm most proud of. She became my partner two years ago, securing the future of our firm. On a client level, helping clients achieve the best life possible through our collaborative partnership is extremely rewarding and fulfilling as planners."

Tee Meeks

Chief administrative officer, chief compliance officer, and partner, Waddell & Associates LLC

As one would imagine, with several impressive titles, Tee Meeks has several critical responsibilities. But with her retirement coming soon, she's also focused on preparing her team and the firm for her departure. "As Waddell & Associates continues to grow, I want to ensure that our strong compliance culture and the characteristics that make it a great firm are amplified and expanded upon after I have left," Meeks said.

A big industry change she's seen is an expansion of services to keep up with the changing needs of clients. At Waddell, investment management eventually expanded to include comprehensive financial planning. Now, they also assist clients with mortgages and other loans, identify cash reserves options, conduct comprehensive insurance policy reviews, and actively manage retirement funds in clients' company plans. "While our firm started with a narrow focus, we've adapted to accommodate the needs of our growing client base, enabling our clients to come to us for all their financial needs," she said.

Quotable:

"Watching the firm grow from \$200 million in assets when I first joined to over \$1 billion in assets [is my biggest career achievement]. ... This growth has allowed Waddell & Associates to offer various partnership opportunities, and in 2016, I was invited to be one of the firm's first partners. ... It's allowed me to play a greater role in spearheading Waddell & Associates' growth trajectory and overarching goals. I'm eager to continue contributing to our firm's ongoing innovation."