

Retirement the Way You Want It

Retirement Solutions Group, Inc.

Debbi Christie Marcum knows what it's like to be blindsided. And she has turned that experience into a strength for her financial clients.

When her husband of many years passed away unexpectedly just six months before his retirement, she had to quickly learn how to manage their assets. She took her financial matters in hand, and those skills would become the basis of a new career: today she proudly serves as president of Retirement Solutions Group.

Her approach, centered on safe money planning and asset preservation in retirement, is rooted in her faith, a true desire to help others and a commitment to "paying it forward."

"I really do believe in what I do," Marcum confided. "We are very different from other companies. My clients don't pay me a penny." She added with a laugh, "I go against every business model on the planet."

The approach is working. She has authored a book, was recently asked to speak at Gradient Investments Women in Business to help mentor others and is a member of the prestigious Million Dollar Round Table, Top of the Table.

Building Trust

Her process begins by getting to know the potential client; this meeting often takes place at the client's home, where they're most comfortable.

"I just sit down and get a picture of their situation. If I can improve their situation, I ask to meet with them a second time and make my recommendations," she said. And then she steps back. Some clients have been surprised that she lets them take all the time they need to make a decision about working with her. But she believes that it's more important to have her clients' trust than to rush the process.

Her clients appreciate this care, as well as a key skill she carried over from her previous career as an educator: her ability to explain complex aspects of retirement planning and asset management in a way they can understand. Clients tell her, "I only saw the individual trees, and you helped me see the entire forest."

Ultimately, she helps clients plan for their future security, whether that means deciding when to begin drawing Social Security, maintaining income after losing a spouse or having a comfortable



Debbi Christie Marcum

life after a spouse needs elder care. She's even helped clients pick out a new car so that they don't worry about being taken advantage of.

It's clear that Marcum enjoys providing a personal, family-oriented experience. "You're not just a number. I'm not going to make a recommendation for an investment I wouldn't make for myself or my family."

Look for Debbi Christie Marcum's new book, *From the Ashes: What Widowhood Taught Me about Financial Freedom*, on Amazon



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