

Client Quick Reference Guide

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Client Success

TagsTeam

FG Client Services Quick Reference Guide

Financial Gravity (FG) Companies Inc., along with its subsidiary companies, provides investment and tax professionals with a turnkey family office charter. To learn more about each division of our company, here is a list of our websites for your reference:

- <https://financialgravityassetmanagement.com/>
- <https://financialgravityenhancedmarkets.com/>
- <https://financialgravityfamilyofficeservices.com/>

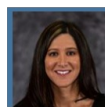
Who to Contact

Your Client Success Team can be reached at (800) 588-3893 - Press 2.

Make sure to add this number to your save phone numbers! You can also email our team at clientsuccess@financialgravity.com.

Meet the Client Success Team

Client Relationship Advisory Team



Jill Henderson
EVP of Client Success
Series 6, 7, 63, 65, 24 licensed
CA State Insurance Licensed
B.A. Communications

Client Relationship Service Team



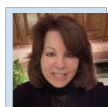
McKensey Taylor
Director of Operations
B.B.A. in Accounting



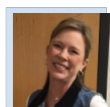
Samantha Winters
Senior Operations Specialist



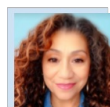
Holly Strickland
Senior Client
Relationship Specialist
NM State Insurance Licensed



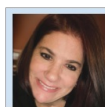
Lauren Alexander
Operations Specialist
B.A. in English and Literature



Elissa Penniman
Operations Specialist
B.B.A. in Management



Patricia Montano
Client Relationship Specialist



Laura Wagner
Client Relationship Specialist
Series 99



Client Login References

- [Client Portal Overview](#)
- [Financial Planning Overview](#)
- [Charles Schwab Overview](#)
- [Pontera Overview](#)
- [Fidelity Overview](#)

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Ass
Services, LLC. (FG Family Office Services), an SEC Registered Investment Adviser. Neither FG Asset Management nor FG Family Office Services provides tax or legal advice and is not a certified public accountant.

Client Review Meetings

- What to Expect: Check-In Call
- What to Expect: Review Call

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Permalink to this article: <https://knowledgebase.financialgravityapps.com/home/quick-reference-guide>

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