



Financial Advisors In Gaithersburg, MD, Carmichael Hill Celebrates Team Member Earning The CFP Certification

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Carmichael Hill, an SEC registered investment advisor based in Gaithersburg, MD, is proud to announce that one of its advisors, Phillip Garrett successfully earned his CFP® marks in August last year.

The Certified Financial Planner® designation is considered the gold standard for accreditation in the financial planning world. Most practitioners study for 18-24 months before sitting for the certifying exam, which has just a ~67% pass rate. Beyond the certifying exam, CFP® Practitioners must also hold at least a bachelor's degree and have 6,000 hours of prior professional experience. Moreover, Phillip Garrett's achievement is also underscored by the fact that he is one of the youngest CFP® Practitioners in the country with just 6% of all practitioners being under age 30.

Phillip talked about his recent achievement by saying, "Here at Carmichael Hill, we work collaboratively to better the financial lives of our clients and create worry-free outcomes for everyone we help. We do so by applying our years of experience and unmatched financial expertise to solving our clients' problems in ways that are the most efficient and beneficial to them. With my CFP® certification, I have earned the industry distinction needed to instill confidence in those I serve that I will always provide accurate advice and look out

for their best interests. I am proud of the role that I play at Carmichael Hill and the CFP® certification showcases my passion to do just that.?

Phillip joined the Carmichael Hill team in July of 2021. He is a Gaithersburg, MD, native and attended Thomas S. Wootton High School and then went on to graduate from the University of Maryland, where he earned a bachelor's degree in business management. Phillip's passion for helping others achieve their financial goals runs deep as he started crafting financial plans for his mother and relatives at the age of 12. When not in the office, Phillip enjoys spending time with his loved ones, serving at his church, and playing sports.

Phillip talks about his work at Carmichael Hill by saying, "The one thing I love the most about my job is the people! For me, nothing compares to the blessing of being able to care for and build long-lasting relationships with our clients. My areas of expertise include cash flow analysis, investment portfolio development, retirement planning, and insurance. I believe in the company's mission and am ready to help you plan for the retirement that you've always wanted."

The full range of services offered at Carmichael Hill includes retirement income planning, investment management, social security optimization, tax analysis, workplace benefits evaluation, insurance analysis, and estate planning. The company has received several five-star reviews on its Google Business Profile, which has a perfect 5-star overall rating from 17 reviews, from clients thanking it for helping them get their finances in order, its patient and knowledgeable advisors, and supportive customer service.

One client says, "As clients of Carmichael-Hill & Associates for over 20 years, my husband and I highly recommend them. Everyone at Carmichael-Hill is knowledgeable, friendly, and always ready to help with any questions. They are on top of our investments and contact us with recommendations for any adjustments to keep up with market changes. Their communication is great. You can depend on Carmichael-Hill to help with your needs; plus, they are a fiduciary!"

Another client writes, "We and our family have been clients of Carmichael Hill since 2007-08 when David Carmichael was still active in the practice. Jim Stewart who now owns the business was relatively new and has always been involved with our family's portfolios. They have been great for us, and I can't think of a better partner, always giving sound advice even when my ideas have been a little wacky, shall we say. The fact that they are local is another positive. They have always been helpful and generous with their time, and I've learned a lot from them."

Readers looking for the best financial advisors Gaithersburg, MD, has to offer can contact Carmichael Hill at

(301) 217-9300.

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For more information about Carmichael Hill, contact the company here: Carmichael Hill Matt Bacon (301) 217-9300 mattb@carmichael-hill.com

Carmichael Hill

We're a diverse set of planners spanning generational divides, geographies, and backgrounds. Our perspectives are unique, as is each member of our team.

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