



Legacy

By Nancy Lottridge Anderson, CFA, Ph.D.

Thirty-three years ago, I hung out the New Perspectives shingle in Clinton, Mississippi. As a young widow, I needed an office that was close to home and close to my daughter's school. It was just me in that small backroom, surrounded by books and files as I began the hard work of building a business and building a reputation as a trustworthy advisor.

New Perspectives grew, and I needed more space. The decision to move the office to Ridgeland was a big leap, but it paid off. While most of our accounts are located in Mississippi, we began adding clients in other states. Currently, we serve clients in 24 states.

Along the way, I added employees to help with the workload, and fifteen years ago, Ryder joined me, later becoming a partner. Five years ago, he stepped up to managing partner. While I am still an owner and a team member, I understand there is a new generation of advisors taking the lead. In fact, I am proud to be passing the torch while still lighting the way for this capable team.



Now, we are taking another leap. We just opened a branch office in North Carolina. Meredith DeLaune, with her years of experience with us and her Certified Financial Planner status, will be manning the office. I am now living just up the mountain from the new office, but it will be Meredith putting in the hard work to build a business and a reputation in a new place. While you may miss seeing her face in the Mississippi office, you'll still hear her voice on New Perspectives phones as she services our existing clients while adding new ones.



On October 7th, we will christen the new office with an open house. Some of our Mississippi team will be on site as we open the doors to the local community and show them our famous Mississippi hospitality.

I am excited about this new venture. My legacy is a new crop of advisors who share my vision of a business built on expertise, integrity, and service. Passing on my knowledge and wisdom is a thrill for me at this point. As long as they let me, this old woman will be part of this growing and vibrant team.

"Someone is sitting in the shade today because someone planted a tree a long time ago." –

Warren Buffet

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