



## Sam Greckel, CFP®

### Financial Planner

Sam Greckel, CFP®, joined Henssler Financial in January 2021 as an Intern in the Planning & Implementation Department. She accepted a full-time position as a Client Service Associate in May 2021. In January 2022, she was promoted to Financial Planner where she assists Managing Associate K.C. Smith, CFP®, CEPA, and Senior Associate Logan Daniel, CFP®, CRPC®, with preparing and reviewing client asset allocation, client cash flow projections, processing client information, and client services support duties.

As a Financial Planner, Ms. Greckel is responsible for assisting the Associates in rebalancing accounts, opening and closing of accounts with custodians, monitoring cash flows, and compiling accurate client review data. Ms. Greckel also assists with training new cohorts of interns.

Prior to joining the firm, Ms. Greckel was a Parking and Transportation Student Worker at Georgia College & State University, assisting students, staff, and visitors with parking and transportation services on campus. She also worked as a Financial Reporting Intern at Voya Financial.

Ms. Greckel earned her Bachelor of Business Administration in Accounting from Georgia College & State University. She is a CERTIFIED FINANCIAL PLANNER™ certificant.



*CERTIFIED FINANCIAL  
PLANNER™ Certificant*

*3 Years of Financial  
Services Experience*

*Member of Financial  
Planning Association*

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Henssler Financial is a financial planning and money management firm with assets under advisement of approximately \$3.22 billion as of June 30, 2024. Henssler Financial, which includes federally registered investment adviser G.W. Henssler & Associates, Ltd. and is headquartered in Kennesaw, Georgia, a suburb of Atlanta.

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