
ASHWORTH
FINANCIAL GROUP

> ***Wealth is the ability to fully experience life.***
>
> -HENRY DAVID THOREAU

OUR COMMITMENT

We understand that every individual and every family has their own unique financial goals and long-term objectives.

We take the time to help you clarify what you want your financial priorities to be.

We offer comprehensive strategies with access to a full range of financial products and services, designed to help you efficiently arrive at your long-term financial destinations.

We custom tailor your plan to meet your specific needs and goals based on your priorities.

HOW WE HELP

Ashworth Financial Group specializes in helping individuals develop sound retirement strategies and help keep you on track, whether you are retired – or approaching retirement. We offer personalized, hands-on service and educate our clients about financial concepts and products, and take the mystery out of investing, insurance, estate conservation, and preserving wealth.

We understand the many challenges of retirement today and know the biggest concern for many is outliving their money. We focus on money management, as well as other issues that are critical to your financial well-being and custom tailor every single plan for each individual client.

If you fail to prepare, you're prepared to fail.

–MARK SPITZ

INVESTMENT PLANNING

Morningstar Reviews
Asset Allocation Reviews
Investment Performance Reviews
Independent Manager Selection
Portfolio Risk Analysis
Custom Tailored Portfolios
Investment Market Overview and Analysis

FINANCIAL PLANNING

Cash Flow Analysis
Education Planning Analysis
Estate Planning Analysis
Family Gifting Programs
Retirement Planning Analysis
Charitable Trust Planning
Philanthropy

TRUST & ESTATE ADMINISTRATION

TRUSTS*:
Determine Trust Needs
Offer our Guidance
Implement your Trust Plan

ESTATES:
Estate Planning Analysis
Assist in sorting out Estates when the time comes
Estate Distribution

*LPL Financial representatives offer access to Trust Services through The Private Trust Company N.A., an affiliate of LPL Financial.

OUR CORE BELIEFS

- SERVE THE CLIENT'S BEST INTEREST
- ACT IN UTMOST GOOD FAITH
- AVOID CONFLICTS OF INTEREST
- DISCLOSE ALL MATERIAL FACTS
- CONTROL INVESTMENT EXPENSES
- ACT PRUDENTLY – WITH THE CARE, SKILL AND JUDGMENT OF A PROFESSIONAL

MEET OUR TEAM

Michael K. Ashworth, CFP®

MANAGING DIRECTOR

It is our commitment to develop our relationship and play a key role in helping our clients achieve their personal and financial goals. Clients often seek our advice on financial matters that go beyond the scope of their investment portfolios and we welcome it.

For over 20 years now, Mike has helped clients address their financial concerns and develop strategies by focusing on each individual's specific needs. With extensive experience throughout major shifts in the markets, Mike has dedicated his career to delivering the personalized investment planning services his clients deserve.

Mike began his career as a Financial Advisor with Paine Webber in Raleigh, NC, where he developed his fundamental investment knowledge. In 2006, Mike earned the CFP® designation by completing an approved educational program and passing a rigorous examination. In 2010 he moved to Tryon, NC to take over as manager of the Wells Fargo Advisor's branch and help retire the existing manager at that time. A decade later, Mike made the decision to launch his own firm, Ashworth Financial Group, affiliated with LPL Financial. As Founder and Managing Director, Mike is excited to be able to expand his offerings to his clients along with offering truly objective financial advice. Operating with honesty and integrity with our clients' best interest at heart continues to be our ultimate goal.

Mike is a graduate of North Carolina State University where he received bachelor's degrees in Accounting and Business Management with a concentration in Finance. He was also a member of Alpha Kappa Psi business fraternity.

Mike spends his free time with his wife, Amy, and their four children, Susanna, Harrison, Brinson and Claire. They like to stay active with their children and their sporting activities, as well as through civic work in their community. They also enjoy spending as much time as they can outdoors on their family farm.

Steven Collie, CFP®

LPL FINANCIAL ADVISOR

For more than 30 years, Steve has worked in the financial services industry. His passion is his work and helping his clients plan for and enjoy their retirement. He is dedicated to working with his clients to help them meet their financial goals.

Steve began his career with Liberty Life Insurance Company and after 10 years, decided to broaden his financial experience and become an Advisor with A.G. Edwards. He has continued his career path with A.G. Edwards' successors Wachovia Securities then Wells Fargo Advisors until 2020 when he made the decision to go independent with Ashworth Financial Group. He has felt for some time that the best alternative for his clients would be to become independent so he can truly take control of his own destiny and give clients the best service there is to offer.

Steve is a graduate of North Carolina State University where he received a Bachelor of Science degree in Computer Science.

Steve and his wife Carmon made Tryon, NC their home in 2009 where they enjoy the natural setting of their log home in the foothills. They are members of Bethlehem United Methodist Church where Steve leads the music ministry. He is also active in prison ministry. He has two daughters, Shannon, who lives in Charlotte with her husband and their daughter, and Lauren, who lives in Gramling, SC with her husband with their two daughters. Both girls are in the medical field. Steve is blessed being surrounded by all of his girls.

His personal interests are playing golf, playing the guitar, working on projects in his workshop, and being a grandfather.

MEET OUR TEAM

Katheryn L. Gordon
LPL FINANCIAL ADVISOR

Katheryn previously worked as a registered client associate and as a Financial Advisor with Wells Fargo Advisors alongside Michael Ashworth, CFP® and Steve Collie, CFP®. As a Financial Advisor, she helps clients set up retirement programs, college savings plans, and standard investment accounts. Katheryn specializes in assisting clients with life changes, whether it is bringing a new child into the world, sending a child off to college, retirement, or dealing with the loss of a loved one.

Katheryn strives to help each one of her clients plan for a financial future in a way that best meets his or her goals. It is important to Katheryn that clients clearly understand the process of wealth management and how it applies to them. She also values strong, trusting relationships with her clients and believes that it plays a key role in helping them achieve their goals.

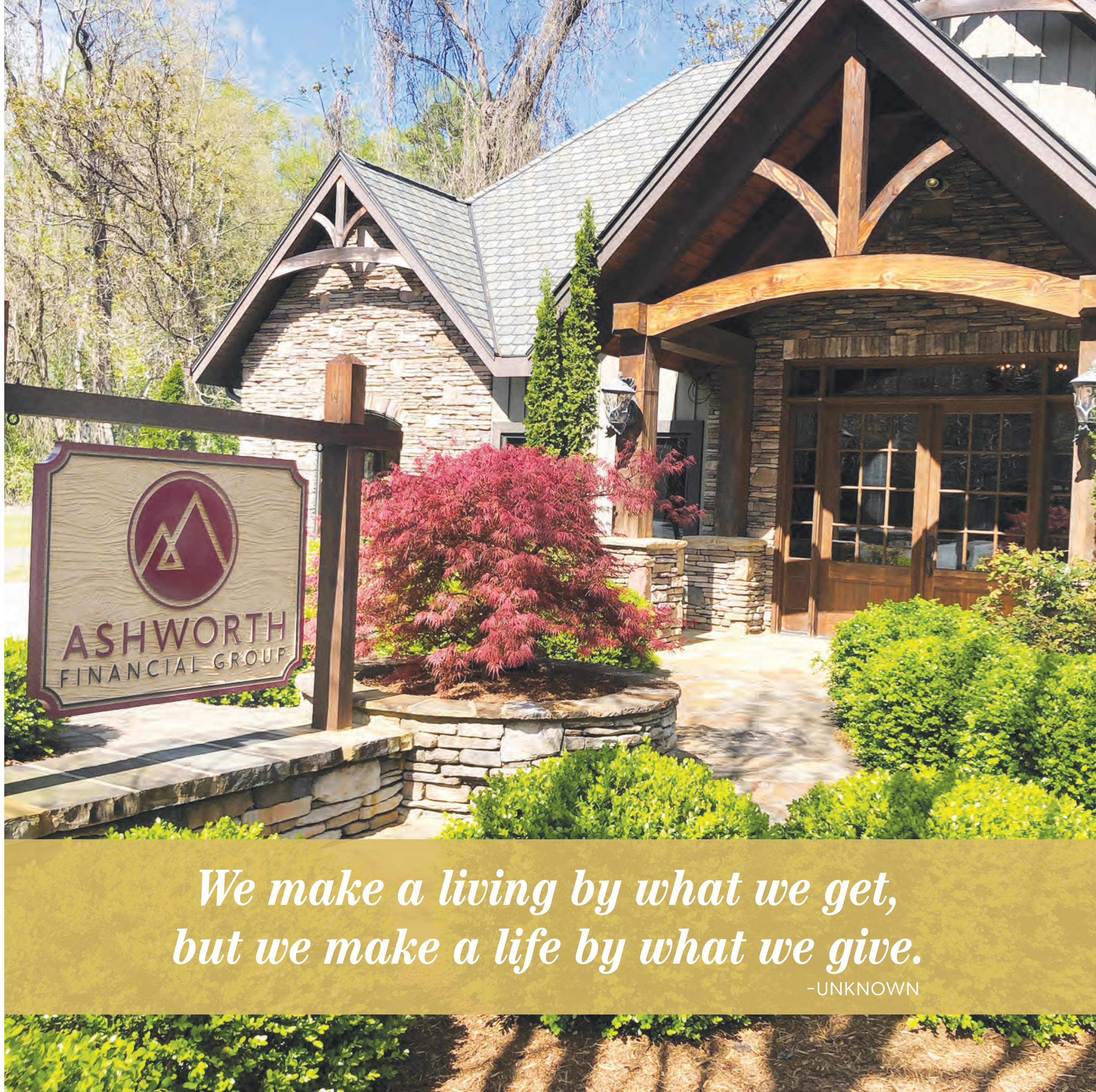
In her free time, Katheryn enjoys spending time with her husband, Brad, their daughter, Emma, and two dogs. They enjoy staying physically active, traveling and cheering on the Tennessee Volunteers. Katheryn also enjoys volunteering in the community with Thermal Belt Outreach Ministry for the Tryon Half Marathon, as well as with the Tryon Fire Department where her husband is a member.

Lisa Murphy
DIRECTOR OF CLIENT RELATIONS

With nearly 20 years of experience in brokerage operations, Lisa brings to the team a diverse array of administrative talents. Lisa manages all operational service needs for clients. She assists them with new account openings, account transfers, managed account changes, cash needs and a range of general inquiries.

Her knowledge, experience and commitment help the team to provide a high level of service and attention to clients. Lisa keeps the team informed of all client needs and inquiries and coordinates the team's response.

Lisa and her husband, Wayne, reside in Campobello, SC with their children Jacob and Emily.



We make a living by what we get,
but we make a life by what we give.

–UNKNOWN

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