



AMY POLLARD, FPQP™

Senior Paraplanner

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Amy Pollard is a Financial Planning Associate and Financial Paraplanner Qualified Professional™ with Warren Averett Asset Management. Her primary responsibilities include coordinating and interacting with clients on a variety of financial matters including retirement planning, investment management and estate reviews. Amy resides in the Oak Mountain area with her husband and two children.

Community Involvement

- Church of the Highlands

Ask Me About

- The importance of setting a budget
- How to start the process of building your financial plan
- How to open a 529 College Savings account
- The difference I found working with clients versus patients
- My experience fostering a dog
- How my two boys keep me busy

INTENSE
CLIENT FOCUS

Designations and Certifications

Financial Paraplanner Qualified
Professional™

Areas of Special Emphasis

[Private Client Services](#)

Education

Jacksonville State University, Jacksonville, AL

University of Alabama at Birmingham,
Birmingham, AL