



Terri Carlin, CTFA

Client Services and Operations Manager

Get to know Terri...

Terri grew up in Knoxville, Tennessee, and she has worked in the financial industry her whole career.

While in banking, she was a teller, head teller, customer service representative, assistant manager, and customer service representative trainer. In 1992 Terri moved to the trust and investment arena, and for the next seventeen years she worked as a trust officer to help high net worth clients achieve their financial goals.

During that time Terri graduated from Cannon Trust School and National Trust School. As a Certified Trust and Financial Adviser, she focused on trust administration, estate settlement, and business development.

Terri joined Visionary Horizons in January 2010 because she wanted to work for an organization that shared her client care philosophy. Terri believes in serving the client's interests, not the company's. In her

role as Client Relationship and Operations Manager, Terri oversees operations. Her responsibilities include client services, onboarding and training new advisors, advisor assistant training, trading and rebalancing of accounts.

Over the years Terri has advocated for the elderly as an Ombudsman and has done various volunteer projects.

“You only live once, but if you do it right, once is enough.”

- Mae West

She is a member of the Knoxville Estate Planning Council and One Hundred Women Who Care Knoxville.

Terri enjoys the beach any time of the year and follows University of Tennessee sports. Terri and her husband Wade share a home with their dog Lily, and they have two children and five wonderful grandchildren that keep them very active.

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