



Get to know our staff, stay up to date on market trends, learn about upcoming events, and increase your money management confidence. [Welcome to our monthly newsletter.](#)

### MEET THE ADVISORS



#### GREER DUCKER

AAMS®, ADPA®

Lisa and I were married in 2015, and together we have a beautiful blended family of four adult children. We are also the parents of the world's most

mischievous dog, Barkley.

I like to golf and am growing my watch collection. I also love wine and have dabbled in making it myself.

#### LISA ROSENBERG



Born and raised Jewish on Long Island, I grew up with an older brother and an identical twin sister. I earned both my undergraduate and graduate degrees in Mathematics from Binghamton University.

Outside of work, I stay active through running and weightlifting. You'll always find one or two novels on my nightstand—reading helps calm my mind at the end of the day.



#### JEFF CHAMPIGNY

I grew up in Rhode Island, moved to Greensboro in 2013, and have been on the Greensboro Sports Council since 2023. I love all sports but

most notably college basketball (VCU, ECU, UNC). As a runner, I've raced multiple Ultra marathons: my best half-marathon is 1:30:58, best 5k is 19:42, and best 1-mile is 6:16 (as an adult).

I also have an 8-year-old daughter, who loves being on her swim team.

### *On a personal note -*

this month's newsletter is focused on helping you get to know us. We want you to know who we are when you call or come into the office, beyond just our titles and qualifications. So, this is us— And we're so happy to be on your team.

### WHO ARE THE BOAs?

#### BRANCH OFFICE ADMINISTRATORS

Call us to [schedule appointments](#), [set up money movements](#), and [get answers](#) to your basic, everyday questions. We are also the ones who will send you any [paperwork](#) or [forms to sign](#).



#### JOSCELYN

Raised in Greensboro, I love doing my own nails and reading a good book. I have a cat named Honey, and my favorite treat is gummy bears. I always have them stocked at my desk.



#### DIXIE

I love spending time with my husband, Mark, my son and his wife, and our grandchildren, Andrew and Caroline. Whenever I can, I like going to the beach and reading books.



#### REBEKAH

New to North Carolina, I'm on the hunt for good hiking and restaurant recommendations! I have a degree in Painting and Art History, speak Portuguese, and am obsessed with chocolate.

#### CALL US

Office (336) 510 - 0226

#### TEXT US

Greer (336) 793 - 5921

Lisa (336) 793 - 5014

Jeff (336) 793 - 3485

Joscelyn (336) 398 - 3777

Rebekah (336) 383 - 1201

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Our texting numbers **cannot** receive phone calls.

