

## Tara Henderson Ingram, MS, CFP®

### Associate Advisor

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205.208.8710 — Birmingham, AL

*"The relationship between a client and an advisor is built upon the foundation of vulnerability, integrity, and trust."*

Tara's passion for building relationships and helping others reach their financial goals led her to Bridgeworth, where she started her career as a summer intern. She earned her master's in Financial Planning at the University of Alabama in 2020 before returning as a full time Planning Coordinator. Since joining Bridgeworth, Tara has obtained the CERTIFIED FINANCIAL PLANNER™ certification and is now an Associate Advisor.

As an Associate Advisor, Tara helps clients plan for life's transitions ranging from starting a new career to retirement. She recognizes the importance of being present through the varied steps of her clients' financial journeys, and helping them steward their finances to reach their goals in life.

Tara prepares for and executes client meetings and works alongside advisors to review portfolios. She also acts as a liaison between advisors and the Bridgeworth financial planning and trading departments.

Both born and raised in Birmingham, Tara and her husband, Wayne, now reside close to friends and family in Crestline Park. They enjoy traveling, hosting friends, cheering on the Crimson Tide, and spending time with their dog, Todd. They attend Mountain Brook Baptist Church and enjoy serving as volunteer classroom parents at Restoration Academy.



#### HONORS

- American Council on Consumer Interest (ACCI): First Prize for Undergraduate Research, 2019

#### AFFILIATIONS

- Financial Planning Association of North Alabama: Member, 2022-Present, Director of Career Development, 2022-2023
- Restoration Academy: Junior Board Member 2022-Present

#### EDUCATION

- University of Alabama, 2020, Bachelors of Science: Consumer Science with a concentration in Consumer Affairs
- University of Alabama, 2020, Masters of Science in Financial Planning
- CERTIFIED FINANCIAL PLANNER™, 2023