

## Lauren Oschman

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**From:** Lauren Oschman  
**Sent:** Thursday, June 15, 2023 4:55 PM  
**To:** [REDACTED]  
**Subject:** RE: CFP  
**Categories:** Finished

Hi Holly,

Nice to “meet” you – I’m so glad Meredith put us in touch! I love working with she and Adam and am always excited to meet those she speaks so highly of!

I’d love to get a phone call on the calendar to talk a little bit more about where you are currently, what you’re looking for, and tell you more about what we do to see if it might make sense moving forward. You can [CLICK HERE](#) to access my calendar and choose a time that works well for you. I know summer schedules can sometimes be especially challenging to line up with vacations and such, so if you don’t see any times that work, send me some availability on your end and I’ll do my best to accommodate.

I look forward to talking soon!

Best,  
Lauren

**PLEASE NOTE: We've moved our office! We are in a beautiful space in Green Hills located at [3811 Bedford Ave, Ste 206, Nashville, TN 37215](#). Please use the new address for all mail effective immediately. We look forward to seeing you in our new space soon!**



### Lauren Oschman, CFP®, CDFA®

Partner & CEO

*InvestmentNews 40 Under 40\**

*Nashville Business Journal 40 Under 40\*\**



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[Schedule a phone call with me](#)

*\*2021 InvestmentNews: 40 under 40 List: Nominations were solicited from InvestmentNews readers and financial planning industry professionals. Nominees must be 39 or younger and are judged, by the editors of InvestmentNews, on their accomplishments, industry contributions, leadership, and promise (passion, enthusiasm, and ideas). Approximately 1,000 advisors were considered. 4% of candidates were named to the list. Individuals were selected solely based on the subjective opinions of InvestmentNews' editors and are not indicative of the advisor's future performance. Your experience may vary. For more information, please visit [investmentnews.com](https://www.investmentsnews.com)*

*\*\*2021 Nashville Business Journal 40 Under 40 List: Nominations were solicited from the public. Nominees must be under 40 as of March 1, 2021. An independent panel of judges comprised of past winners read, judged, and scored questionnaires filled out by nominees including their top professional accomplishments and community involvement. The top-scoring names were named to the list. Approximately 300 professionals were considered and 40 were named to the list. Individuals were selected solely based on the subjective opinions of the judges and are not indicative of the advisor's future performance. For more information, please visit <https://www.bizjournals.com/nashville/>.*

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**From:** [REDACTED]  
**Sent:** Tuesday, June 13, 2023 12:02 PM  
**To:** Lauren Oschman <[loschman@vestia.com](mailto:loschman@vestia.com)>  
**Subject:** CFP

Hi Lauren,

My husband and I are looking for a financial planner, and you were recommended to me by a colleague, Meredith [REDACTED] I was wondering if I could schedule a time to chat with you about what services you offer, fee structures, etc.?

Thanks and look forward to hearing from you,  
Holly [REDACTED]