

1. Jacinta Thompson

Updated at Jul 02, 2025

Submission Date	Jul 2, 2025
Your Name	Jacinta Thompson
Case Name	Bloundt Family
What is the background on how the client was introduced to our firm?	Jason Hester stated he has worked with the family for a few years. They have a large investment account with the firm and they were working through their succession and estate plans. He hadn't ever engaged with them on the 401(k) but was willing to make an introduction. An introductory Zoom was scheduled and we went from there.
Who all was involved in the case from start to finish (Balefire team members and outside advisors if applicable)? What were their roles?	Jason Hester for the introduction. Pete Peterson as a teammate and myself.
What problems did we help the client solve?	They were not getting any assistance with their 401(k). They began the plan years prior and simply hadn't been updated or monitored officially, nor are they getting any education assistance.
Were there any challenges along the way? How did you overcome them?	There weren't any challenges. The client was excited to hear all we had to offer and signed the letter of intent the same day.
What was the total revenue generated from this case?	Approximately \$17,000 of recurring revenue
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