

# NASHVILLE BUSINESS JOURNAL

## 40 Under 40: Erik Milam, TrustCore

Erik Milam, 34, began his financial planning practice at TrustCore in 2006. Before he decided to help others with their financial goals, young Milam wanted to be a doctor, earning him the nickname “Doc” at a young age.

**What one talent do you wish you had?** Play guitar and sing.

**What advice would you give young professionals just entering the workforce?** Write down your life goals and be aware of your cash flow. Save first for your goals and you can enjoy your money without guilt.

**What’s the best part of your job?** I get to listen to people and help them achieve their most meaningful goals.

**What’s your ideal way to spend a day off in Nashville?** Spend time with the family at Sevier Park or Radnor Lake, a round of golf with friends and then dinner with my wife at Red Pony in Franklin.

**Describe your strangest day at work.** I was on a plane to New York on Oct. 9, 2008, when the stock market dropped 7 percent. [It was a] very tough day for a young financial planner to be out of town.

**What is your favorite app, and why?** Team Stream by Bleacher Report is a quick way to keep up with my favorite sports teams.

**What did you want to be when you grew up?** A doctor. My nickname in elementary school was “Doc” because I was always helping other kids.

**What one thing would you like most to achieve next?** Write a monthly newspaper column on financial wellness and give a TED Talk.

**What would you most like to see in Nashville’s next mayor?** We have a great city, and we have great candidates willing to give their time and talents to lead our city. I’d like to see a mayor who truly cares about Nashville more than politics. We need a mayor who values a balanced budget to champion smart strategies for business growth, revamp public education and improve transportation infrastructure.

**Please describe your top three professional accomplishments at your current company.** I began my practice with TrustCore in 2006 after earning my Certified Financial Planner™ designation. Emphasizing client service, I have grown my practice almost entirely through word of mouth referrals. Now



### CLOSER LOOK

**Title:** Financial planner

**Company:** TrustCore

**Age:** 34

**Email:** erik.milam@trustcore.com

**Twitter:** @erikmilam

**Web:** trustcore.com

**Education:** Baylor University, B.B.A. with majors in financial planning and entrepreneurship

more than 60 families rely on me for my expertise and guidance. Since starting my practice, I have achieved 44 percent compound annual revenue growth.

**Please describe your three most unique and impressive accomplishments spanning your entire career.** I became Board President of United Cerebral Palsy of Middle Tennessee in 2013. Since then, UCP has increased fundraising, added special events, and appointed nine new board members. In April 2014, I delivered a keynote speech at the United Cerebral Palsy national conference. I have served

on the UCP Board since 2010. Other charitable endeavors have included various volunteer roles for Montgomery Bell Academy and the Oak Hill School. I am also a proud member of the Rotary Club of Nashville.

**What hidden talent or hobby do you have?** I believe my hidden talent is public speaking even though I had a severe speech impediment from childhood through college. I never imagined I would be asked to give talks to football teams, businesses and schools on topics like: resilience, overcoming adversity, acceptance, and living with a disability.

**What do you know now that you wish you’d known at 18?** Achieving success is more about the process than the result. If you do your best and have a great process, the result will take care of itself.

**Who was your most-valued mentor who helped inspire you to where you are now?** I have a number of mentors locally and nationally. I wouldn’t be where I am today without them. I am grateful to TrustCore for its support of my career. Darryl Edmonds, Mickey Jacobs and Randy Lee have spent the most time mentoring me. Not only are they great financial planners, but also great husbands and fathers whom I admire both personally and professionally.

**Who is your favorite artist or musical group?** I truly appreciate the talent of songwriters in Nashville. Great songwriters are a vital part of the music business. Two favorites are my friends John Ozier and Eric Paslay.

**What one word best describes you?** Perseverance.

**What is the biggest challenge you’ve had to overcome?** I was born with cerebral palsy and also had a severe speech impediment. As a young child, I had two major surgeries to enable me to walk and went to speech therapy from elementary school through college. I would not be where I am today without faith, a positive attitude and people who believed in me. Having cerebral palsy and a speech impediment are still my greatest struggles both emotionally and physically, yet they are my greatest teachers of compassion, faith, perseverance and acceptance.

**What professional accomplishment from the past five years are you most proud of?** I was honored by Investment News in the inaugural Top 40 under 40 award for the financial planning industry nationally.