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**From:** Lauren Oschman

**Sent:** Friday, October 20, 2023 4:22 PM

**Subject:** RE: An Introduction

Thanks for this intro, Bret – I appreciate your kind words!

Amy – nice to “meet” you! Anyone Bret speaks highly of is someone I’m excited to talk with! I’d love to schedule some time for a phone call or Zoom to hear a little more about you, tell you more about what I do, and see if we can be a good fit to work together. I have included links below you can click to schedule either a Zoom or a phone call when it works for you. I look forward to talking soon!

[Schedule a Zoom](#)

[Schedule a Phone Call](#)

Have a great weekend, everyone!

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®, CDFIA®**

Partner & CEO

*InvestmentNews 40 Under 40\**

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

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 [www.vestia.com](http://www.vestia.com)

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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](http://investmentnews.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, October 17, 2023 10:41 AM

**To:** Lauren Oschman <[loschman@vestia.com](mailto:loschman@vestia.com)>; [REDACTED]

**Subject:** An Introduction

Amy,  
I am emailing you to introduce Lauren Oschman, CFP, CDFP, Partner and CEO of Vestia Personal Wealth Advisors. She has helped Annie and I, along with MANY of the MDs in our department, for years and we highly recommend.

Cheers,  
bret

