Fryar Financial Surpasses $22.5 Million AUM and Expands Advisory Team

Fryar Financial surpasses $22.5M in AUM and welcomes Jeffery Campbell, strengthening its commitment to personalized financial planning.

It's Not the Direction of the Wind But the Set of Your Sails.

DURHAM, NC, UNITED STATES, July 29, 2026 /EINPresswire.com/ -- Fryar Financial Surpasses $22.5 Million in Assets Under Management and Welcomes Associate Advisor Jeffery Campbell

Growth Milestone Reflects Firm's Commitment to Transformational Financial Planning for Pre-Retirees, Retirees, and Affluent Professionals

> We help successful families turn their wealth into lasting financial independence by managing retirement income, reducing uncertainty, and protecting their lifestyle and legacy."
>
> *Marcus W Fryar*

Fryar Financial, a fee-only financial planning and wealth management firm serving clients throughout North Carolina and beyond, today announced that the firm has surpassed $22.5 million in assets under management (AUM) while also welcoming Jeffery Campbell as Associate Advisor.

The milestone marks another significant chapter in the firm's continued growth and reflects two decades of helping clients navigate retirement, tax planning, wealth accumulation, and life transitions.

"Crossing the $22.5 million milestone is a testament to the trust our clients place in us and the relationships we've built over the last 20 years," said Marcus Fryar, Founder and Lead Advisor at Fryar Financial. "We're especially excited to welcome Jeffery Campbell to the team as we continue enhancing the level of service and personalized guidance we provide to our clients."

Campbell joins Fryar Financial during a period of sustained growth fueled primarily through client referrals and the firm's reputation for comprehensive financial planning. In his role as Associate Advisor, Campbell will support clients through investment management, retirement planning, and ongoing financial planning engagements while helping the firm expand its capacity to serve more families.

"Jeffery's addition strengthens our ability to deliver highly personalized advice while maintaining the boutique service model our clients value," Fryar added. "His passion for helping people make informed financial decisions aligns perfectly with our mission."

A Firm Built on Relationships Since 2006

Founded in 2006, Fryar Financial was established with a simple but powerful vision: to help individuals and families make confident financial decisions through objective advice, education, and long-term partnership.

Over the past two decades, the firm has evolved from a traditional financial advisory practice into a comprehensive planning firm focused on helping clients align their financial lives with their personal goals and values. The firm's growth has been driven largely by referrals from satisfied clients and strategic relationships built on trust and expertise.

Today, Fryar Financial serves clients across multiple stages of life, with a particular concentration among individuals approaching retirement and those already enjoying retirement.

Serving a Specialized Client Community

Through years of experience, Fryar Financial has developed specialized expertise serving:

- Pre-retirees and retirees ages 50 to 70

- Technology professionals, Pharma Executives and Higher Education leaders

- Healthcare professionals, including nurses, dentists, and healthcare executives

- Federal, state, and local government employees

- Business owners and executives

- Individuals navigating inherited IRAs, Roth conversion strategies, and complex tax situations

- Families facing special-needs planning, legacy-transfer, and multigenerational wealth considerations

One group we are particularly fond of serving are single African-American women. "We love serving Gen X Black women because they have spent decades building careers, supporting families, and strengthening their communities, often while balancing significant financial and emotional responsibilities. Helping them turn their focus toward their own goals, financial security, and a retirement filled with freedom, purpose, and confidence is both meaningful and rewarding."

Looking Ahead

As Fryar Financial celebrates surpassing $22.5 million in assets under management and expands its advisory team, the firm remains focused on its core mission: helping clients achieve clarity, confidence, and peace of mind regarding their financial future.

"We believe financial planning should help transform lives, not simply manage portfolios," said Fryar. "As we continue to grow, our commitment remains the same—to provide trusted guidance that helps clients make the most of their resources and live the retirement they envision."

About Fryar Financial

Founded in 2006, Fryar Financial is a fee-only financial planning and wealth management firm headquartered in North Carolina. The firm specializes in helping pre-retirees, retirees, healthcare professionals, technology professionals, government employees, and business owners navigate retirement income planning, tax-efficient wealth strategies, investment management, and legacy planning. Through its transformational planning process, Fryar Financial helps clients align financial decisions with life's most important goals.

Media Contact
Marcus Fryar
Fryar Financial
(919) 323-4494
mfryar@fryarfinancial.com
fryarfinancial.com

Advisory services offered through Fryar Financial. Assets under management represent client assets managed by the firm as of the date of this release.

Marcus W Fryar
Fryar Financial LLC
+1 919-323-4494
Mfryar@fryarfinancial.com
Visit us on social media:
YouTube
LinkedIn
Facebook
