



Oppenheimer & Co. Inc. would like to work with you.

Life has a series of cycles from funding your education, starting your career, entering into parenthood, securing your retirement, health and longterm care, legacy planning, or generational business transitions. All of these circumstances require a need for investment planning.

We work with our clients to develop a roadmap for their future, adapting to the life changing situations over time.

We want to work with you to help you achieve your financial goals.

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HADDON TOWNSHIP GROUP
of Oppenheimer & Co. Inc.

Investment Advice

- Professional Money Manager Selection through our affiliate Oppenheimer Asset Management Inc.
- Asset Allocation
- Portfolio Construction



Wealth Planning

- Goals Based Permanent Life
- Planning
- College Savings Plans
- Term Life
- Long-Term Care
- Disability
- Social Security
- Optimization Strategies
- Retirement Planning



Insurance Services

- Life Insurance and Annuities
- Long-Term Care
- Disability
- Health



Mobile Application

- Secure Online Access to Accounts



Trust, Estate and Legacy Planning

- Wills, Trust, Estate Planning, Wealth Transfer Strategies offered through our affiliate Oppenheimer Trust Company of Delaware



This material is not a recommendation as defined in Regulation Best Interest adopted by the Securities and Exchange Commission. It is provided to you after you have received Form CRS, Regulation Best Interest disclosure and other materials.

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