

Do these questions prevent you from taking action on planning your future?

I would be happy to help and give you a no-cost analysis of your portfolio.

After my review, I'll discuss with you my thoughts, and give you relevant and actionable ideas for navigating the current market environment.

What should I do with my
401(k), IRA or retirement
plan when I change jobs
or retire?

Are my funds

Are my assets well-positioned to withstand a major

How much money do I need to retire?

Can I consolidate my 401(k), IRA and retirement plan and still maintain diversification?

economic downturn?

How do I measure the performance of my portfolio?

How do I set up a college savings plan for my children and grandchildren?

Is it time to review my investments in these uncertain times?

Who can help me through a divorce or loss of my loved one?



Cheryl L. Underwood Executive Director – Investments

Taking care of you, your family, and your business is my number one priority. For over 20 years I have been simplifying the complex world of retirement plans and wealth management for clients like you, earning the #1 Financial Advisor position for nearly a decade at a Forbes, "Top 100 Wealth Management Firm" where I advised on over \$400 million assets under administration.

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Established in 1881

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As of 6/30/20