

Women & Investing:

Education Series



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The Palumbo Group of Oppenheimer & Co. Inc. aligns each client's unique goals, values, and needs with a comprehensive wealth management process that yields a holistic financial plan which addresses the entire financial picture. We use an in-depth discovery process that leads to a true understanding of each client's specific situation, time horizon, and risk tolerance. We focus on growing and protecting the assets of high net worth clients.

At Oppenheimer, your financial needs come first. Our goal is to help ensure your financial goals are understood, and to the best of our abilities, met. We will accomplish this together, by:

Listening. The Palumbo Group listens as you explain your short-and long-term goals, to get a full picture of your responsibilities.

Implementation. The Palumbo Group selects investments, suitable to your needs, from a wide variety within in our open-architecture platform.

Offering Informed Choices.
The Palumbo Group shows you investments, products and services

selected as the most likely to help you achieve your goals.

Following Up. Your investments are monitored and rebalanced as needed. You receive regular reports and are encouraged to speak with The Palumbo Group whenever you have questions.

WITH GRATITUDE...

Get a pizza, we give a pizza!

For every frozen pizza purchase that you receive, an identical pizza will be donated to one of our local food banks in your name. Currently, pizzas are being provided to St. Patrick Center, however, donations rotate among local benefitting food banks.

We sincerely hope you and your family will enjoy the pizzas. We have engaged a local, women owned restaurant here in St. Louis to provide these pizzas to you, Katie's Pizza Restaurants.