Client Resource Guide

Team Member	Contact Information	Contact this team member to:
	**Derek Leighton** Financial Advisor/Partner derek@preferredwealthadvisors.com	▪ Review your accounts, financial goals and investment plan ▪ Communicate a life event/change/ major purchase ▪ Discuss advanced financial planning ▪ Explore insurance and estate planning
	**Cyndi O'Connell** Financial Advisor/Founder cynthia@preferredwealthadvisors.com	▪ Discuss advanced financial planning ▪ Communicate life event/major purchase ▪ Ongoing client relationship management ▪ Tax Planning & Preparation
	**Ryan Fountain** Paraplanner ryan@preferredwealthadvisors.com	▪ Assist with accounts, investment goals and financial plan ▪ Prepare and discuss Retirement Analysis ▪ Answer eQuipt questions ▪ Notarize documents
	**Erin Semler** Client Services Associate erin@preferredwealthadvisors.com	▪ Assist with opening new accounts ▪ Process incoming transfers ▪ Inquire about Social Media/Newsletter/Facebook Page ▪ Request account updates (Address, Beneficiary, etc.)
	**Becky Frey** Office Manager becky@preferredwealthadvisors.com	▪ Schedule and prepare for meetings/financial reviews ▪ Update personal information (Name/marital status, address, phone, email, etc.) ▪ Request contributions/withdrawals ▪ Notarize documents
	**Jill Klos** Client Relationship Manager jill@preferredwealthadvisors.com	▪ RSVP for upcoming events ▪ Discuss a question or concern ▪ Suggest an improvement
	**ACA** Office Greeter	▪ Snuggle & unload some stress ▪ Make you smile 😊 P.S. I'm hypoallergenic

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