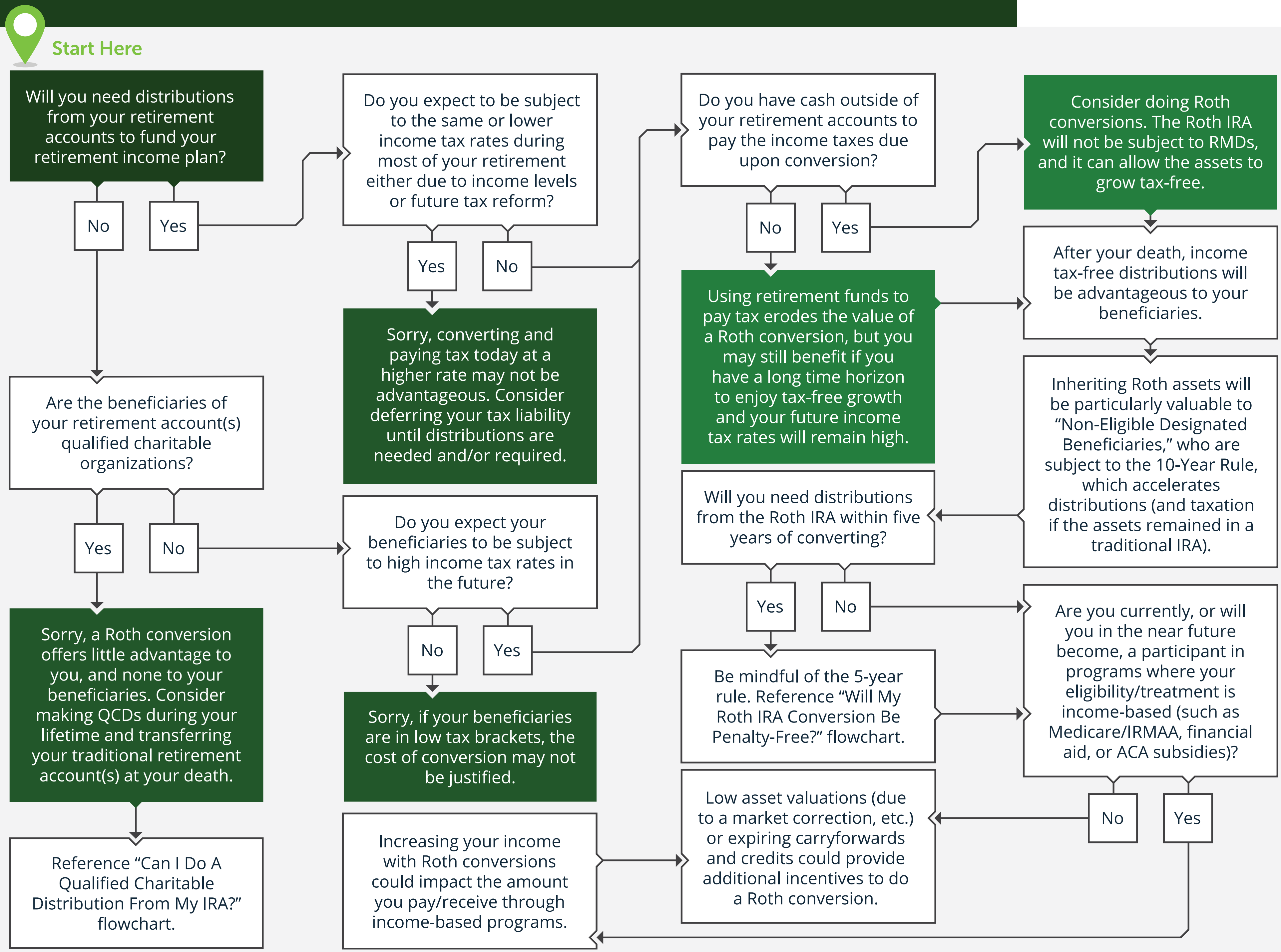
2022 · SHOULD I CONSIDER DOING A ROTH CONVERSION?

PINEYWOODS FINANCIAL



About Our Clients

Keeping Our Focus On You

Pineywoods Financial is an independent financial planning firm with a heart for helping you succeed. We specialize in helping folks that are in or nearing retirement. People come to us when they are tired of getting the run-around from big wirehouses and 401(k) institutions. They want real relationships with down to earth advisors that have real world experience and a fiduciary obligation to act in their best interest. We first opened in 1994 and our advisors have over 45 years of combined industry experience.

Our clients are often looking for help in many different planning areas and we are prepared, equipped, and experienced in almost every related field. They are looking for help with financial tools like investments, annuities, long-term care insurance, Medicare supplements and life insurance. They are concerned about stewarding all their accounts, whether it's a 401(k), 403(B), 457, deferred-comp plan, IRA, Roth, individual account, trust account, employer stock-purchase plan, or defined benefit/pension plan.

Folks that come to us recognize the benefit of not having to piecemill a financial plan together. They appreciate that we can help with investments, taxes, estate planning, Social Security, charitable giving, and surviving spouses. When it comes to your retirement, do you want a single, trusted-source for all of your planning needs?

Jarrod Null, CFP®, CRPC®, Retirement Planning Specialist

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