



A commitment to service excellence

I am now a member of Fidelity's Advisor Concierge Program. This program is a recognition of the work I do with plan sponsors like yourself as well as my outstanding working relationship with Fidelity Investments, one of the top 401(k) recordkeepers in the industry.

While this is certainly an exciting announcement for me and my practice, I am equally as excited about what this means for my clients. **When we work together as a part of this program you will receive:**



Increased efficiency

You now have a dedicated service team with fewer points of contact who are focused on you and how to maximize the value of Fidelity and my team. We are a single service team.



Best in class service resolution

You are now aligned to a Fidelity Concierge - a Fidelity executive who advocates for your unique needs within Fidelity.



A greater voice

I have a strategic relationship with Fidelity and will have a seat at the table so I can bring any concerns directly to Fidelity decision makers



High touch service model

Fidelity's dedicated team and my team have a common focus. We're aligned to provide you the highest level of service with a focus on proactive engagement and meeting your unique needs.

A commitment to service is how I have built my business throughout my career and with the Advisor Concierge program, Fidelity is helping me to honor that commitment to my clients. If you have any questions or would like to learn more about the services that we offer, please let me know and we will set up a time to meet.



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