

Meet Your PNC Investments Financial Advisor



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I'm here to help you take a comprehensive, planning-based approach to achieving your financial goals

As a PNC Investments Financial Advisor, my job is to help you discover where you want your assets to take you, and to help you utilize all of the resources at your disposal to get you there.

It's my belief that financial planning is a process that unfolds over the course of multiple meetings and conversations. In that time, I'll work to help you understand the issues you're facing, set short- and long-term goals, develop a plan that works with your life situation and help make any necessary adjustments to your approach over time.

As your life and needs change, I can work with you to help ensure your financial plans keep pace. I can help you with a wide variety of financial matters, including:

- > **Retirement planning** – I can help you with saving, investing and developing a retirement income plan so you can live the retirement lifestyle you're envisioning.
- > **Investment planning** – I can help you establish sound investment goals and create an asset allocation that includes an appropriate mix of stocks, bonds and cash as it pertains to achieving your goals.
- > **Education planning** – I can provide you with insight into the projected costs of higher education and discuss appropriate options to help reach your savings goals.
- > **Protection planning** – I can help you prepare life insurance strategies and provide insight into long-term care insurance to protect your family.

My approach to financial planning starts with my clients. I take the time to understand you, your family, your goals and your needs, all so I can better connect you with the appropriate resources at the appropriate times. The result is a series of personalized, comprehensive recommendations that are tailored to you.

I joined PNC Investments in March 2014. I have over 10 years of experience in the financial services industry.

I earned an Associates Degree in Business Administration from the University of Baltimore.

I reside in Freeland, MD with my dog, Tazz. In my freetime, I like to travel and play golf. I also enjoy coaching, in particular baseball and basketball, and have been coaching since 1998.

Taking the time to plan carefully now can make all the difference down the road. Whatever it is you want to accomplish with your money, I'm here to help.

Important Investor Information: Brokerage and insurance products are:

Not FDIC Insured • Not Bank Guaranteed • Not A Deposit
Not Insured By Any Federal Government Agency • May Lose Value

Securities products, brokerage services and managed account advisory services are offered by PNC Investments LLC, a registered broker-dealer and a registered investment adviser and member FINRA and SIPC. Annuities and other insurance products are offered through PNC Insurance Services, LLC, a licensed insurance agency.

