PREISZ FINANCIAL

is a financial services firm
dedicated to helping people…

Be Financially Secure

We have served both individuals and organizations since 1991.

We ensure quality client service by employing a staff dedicated to our professional values:

- A Servant's Heart
- Life Long Learning
- Community Involvement

Our people possess a servant's heart—the heart of someone who places themselves in the position of our clients, listens to their needs, and is dedicated to providing them with a timely solution. As such, we make sure that you are completely satisfied with every aspect of your relationship with us.

We are not just here to do a job; we are here to go above and beyond your expectations.

401(k) Checkup

This service provides employees with an opportunity to meet one-on-one with one of our licensed retirement plan service specialists, in a confidential setting typically at your place of business.

In a 401(k) Checkup, we are available to:

- Discuss your plan's rules and regulations
- Assess comfort level with investment risk
- Review the appropriateness and past performance of 401(k) investments
- Determine Retirement Readiness
- Confirm account access

Through this discussion and a live, interactive projection of retirement readiness, we will help determine whether you are on track for a ***Financially Secure Retirement***.

Retirement Plan Service Department

Our Retirement Plan Service Department is staffed by personnel with experience in retirement plan administration. We are available by phone or by email to answer questions you may have about your plan. Most questions can be answered immediately.

Additional Services

(available for a separate fee)

- Financial Planning
- Retirement Income Planning
- Individual & Family Investment Advising
- Individual Insurance:
  - Life
  - Disability
  - Long Term Care

What is Financial Planning?

Financial planning is a close personal relationship between you and a financial professional, who can help you develop a step-by-step plan for working toward your financial goals and monitoring your progress over time.

Employee Education Team

Individual & Family Investment Advisory Services

Carol Bethune, CFP© MBA
carol@preisz.com

Geoff LaRoche, MBA
geoff@preisz.com

Retirement Plan Support Services

Tom Davenport, CRPS®
tom@preisz.com

William A. Preisz, CRPS®, CPA
william@preisz.com

Lesley Woods
lesley@preisz.com

PREISZ FINANCIAL
Your Future...Our Passion

4525 SW Condor Avenue
Portland, OR 97239

503.224.1600
888.224.1600

info@preisz.com
www.preisz.com

Securities offered through LPL Financial, Member of FINRA/SIPC. Investment advice offered through Preisz Financial, a Registered Investment Advisor and separate entity from LPL Financial.

PREISZ FINANCIAL
Your Future...Our Passion

Helping You Be Financially Secure