RAYMOND JAMES

Scott D. Pugan, MBA
Senior Vice President, Investments
CERTIFIED FINANCIAL PLANNER™

As a CERTIFIED FINANCIAL PLANNER™ Practitioner we discuss the client's personal and financial circumstances. The next step is to develop, present and implement the investments and financial plan. Then we evaluate the progress and update clients. Additionally, we will work with the client's legal and tax professionals to help insure we are always working in the best interest of the client.

Karen Relyea
Practice Business Coordinator

- Assist with preparation of analysis and generate reports used for Annual Reviews
- Schedules appointments
- Research and resolve client questions
- Day to day account maintenance

Kelly Beier
Client Service Associate

- Ensures client paperwork and documentation is accurate
- Day to day account maintenance
- Check or direct deposit/withdrawal requests
- Updating client beneficiary forms
- Research and resolve client questions

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