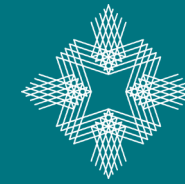


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Have questions? Call us today.



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FAST FACTS

- Registered investment advisor based in upstate NY
- Team's largest client base is heavy highway road and bridge builders
- Focus is on providing full-service for retirement plans, employee engagement, and high net worth planning

STRATEGIC SERVICES

- Investment due diligence
- Performance, governance, monitoring, and reporting
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