

A Client's Guide to Peterson Row Advisory

Contact Information

 8534 Yankee St Suite 1 D Dayton OH 45458

 petersonrow.com

 (937) 797-9150

 calendly.com/jessicadavisfa

Jessica Davis, CFP®

 jessica@petersonrow.com

 (937) 249-6654 (text only)

 (937) 797-9150

Chris Tenbarge, CFP®

 chris@petersonrow.com

 (937) 249-6950 (text only)

 (937) 797-9150

Contact Jessica or Chris for...

- Financial planning questions
- Retirement planning and investment strategy
- Tax planning conversations
- Major financial decisions
- Estate planning discussions
- Scheduling review meetings

Client Service & Operations Support: Chintak Patel & Steve Sipniewski

 team@petersonrow.com

 cpatel@westminsterfinancial.com

 (937) 797-9150

 (937) 898-5010

Contact Chintak or Steve for...

- Account paperwork and forms
- Beneficiary updates
- Address, phone number, or banking changes
- Distribution requests and Required Minimum Distributions (RMDs)
- Money movement requests
- Account maintenance and service requests
- Assistance accessing your accounts
- General questions when Jessica or Chris are unavailable

Scheduling

Visit www.calendly.com/jessicadavisfa to schedule an appointment. If you cannot find an available meeting that works for you or if special arrangements are needed, please contact us directly.

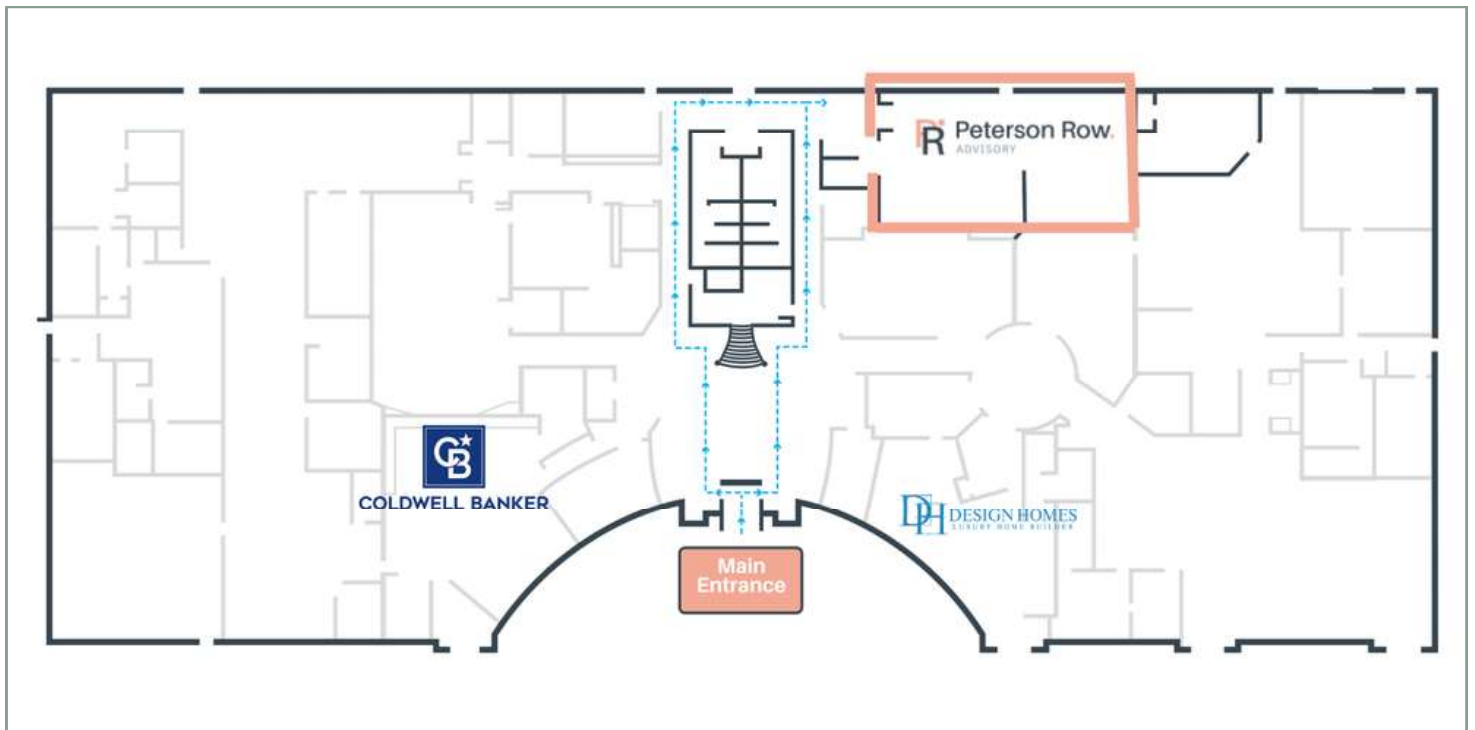
Our Office

8534 Yankee St
Suite 1 D
Dayton OH 45458

Directions

When entering the building, follow the hallway to the right of the staircase, between the staircase and conference room.

At the end of the hallway, turn right. We're located behind the two brown double doors.



Securities Offered Through Westminster Financial Securities, Inc.
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