Peterson Row.
ADVISORY

A Client's Guide to Peterson Row Advisory - Maternity Leave

Thank you for your patience and understanding as Jessica takes time away to welcome her baby boy.
Please know that our team remains available and committed to providing exceptional service during this time.

Contacting Your Team During Jessica's Leave

Chris Tenbarge, CFP® • Steve Sipniewski, CFP® • Chintak Patel

team@petersonrow.com **(937) 797-9150**

All inquiries may be directed to our office and will be routed to the appropriate team member.

While many of you are familiar with Chris, you may not have had the opportunity to work directly with Steve or Chintak yet. They are trusted members of our extended team and will be working closely with Peterson Row to ensure you continue to receive exceptional service during Jessica's leave.

Scheduling

Online scheduling through Calendly will be temporarily unavailable during Jessica's maternity leave. If you would like to schedule a meeting, please contact our office and we will coordinate directly with Chris Tenbarge, CFP®.

Frequently Asked Questions

How long will Jessica be away?
Jessica anticipates being away for approximately eight weeks and currently expects to return to the office around mid-October. As with any growing family, these plans may change slightly, but our team will continue to be available and fully operational during her leave.

Will my accounts continue to be monitored?
Yes. Your accounts and financial plan will continue to be monitored by the Peterson Row team.

Will Jessica still be available?
Jessica will be taking time away to focus on her family and may have limited availability during her leave. If there is an urgent matter, our team will determine the best course of action and coordinate accordingly.

Maternity Leave

Frequently Asked Questions

How can I request a meeting?

Online scheduling through Calendly will be temporarily unavailable during Jessica's leave.

To schedule a meeting with Chris or request a meeting with Jessica upon her return this fall, please call our office at **(937) 797-9150** or email **team@petersonrow.com**.

I have an investment or portfolio question. Who should I contact?

For questions regarding investment strategy, account holdings, portfolio reviews, market conditions, or investment recommendations, please contact our office at team@petersonrow.com or (937) 797-9150. We will coordinate with **Chris Tenbarge, CFP®**, and **Steve Sipniewski, CFP®**, to assist you.

What if I need money from my account(s) or need to update my information?

For distributions, check requests, ACH transfers, bank account updates, address or contact information changes, beneficiary updates, or other account service requests, please contact our office at team@petersonrow.com or (937) 797-9150.

We will coordinate with **Chris Tenbarge, CFP®**, and **Chintak Patel** to assist you.

Where should I mail checks or account paperwork?

Please do not mail checks or time-sensitive paperwork to Peterson Row during Jessica's leave. Please mail checks, account paperwork, and other time-sensitive documents to:

Westminster Financial Advisory
50 Chestnut St Suite A-200
Dayton OH 45440

We appreciate your trust and look forward to continuing to serve you during this exciting season for our family. Jessica looks forward to reconnecting with you this fall.

When in Doubt, Start Here

(937) 797-9150

team@petersonrow.com

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