

It's a New Year.

Time to give your finances a checkup!



- Review IRA limits for 2020.
- Review 401k limits for 2020.
- Is your money working hard enough for you?
- Are your beneficiaries up to date?
- Have you had any life changing events in the last year?

Schedule your financial review with one of our
Investment Executives;

Peter Welsh, Lisa McClyman, Laura Stanek or
Jennifer Kinzler

608-356-7449.



THIRD OAK

INVESTMENT SERVICES

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