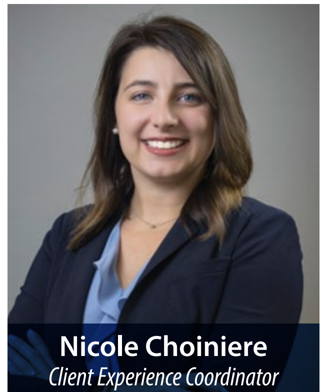
SIMPLEPATH RETIREMENT™
Holistic Wealth Management
& Retirement Planning

YOUR DEDICATED TEAM

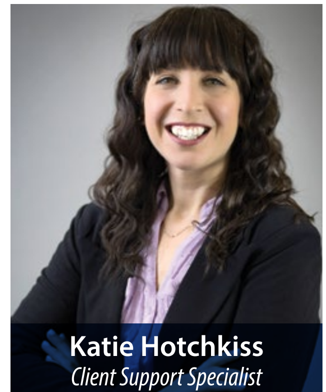
Service@SimplePathRetirement.com
Call or Text us at (727) 304-6000
Fax (727) 304-6001

Celine J. Pastore
Wealth Manager, CEO

Max Choiniere
Associate Advisor



Nicole Choiniere
Client Experience Coordinator



Katie Hotchkiss
Client Support Specialist

ADVISORY TEAM | **SERVICE TEAM**

Your dedicated SimplePath Retirement team of professionals will serve as your one-stop resource; including insights, advice, and impeccable customer service – all tailor made for you.

MEET YOUR SIMPLEPATH TEAM:

Wealth Manager & CEO: Celine J. Pastore, CRPC®, MRFC®

» *Investment Advisor Representative & Licensed Insurance Agent*

» *Lead advisor, oversees and manages all financial planning and insurance services of the firm.*

Associate Advisor: Maxime (Max) B. Choiniere

» *Investment Advisor Representative & Licensed Insurance Agent*

» *Assists Celine with client meetings, financial planning, client technology, investment research, retirement plan allocations, account management and client communication.*

Client Experience Coordinator: Nicole Choiniere

» *Marketing & Events Coordinator & Notary Public*

» *Schedules all new client relationships, events, referral programs, marketing & communications of the firm, on-going client relationships, and notary services.*

Client Support Specialist: Katie Hotchkiss

» *Medicare & Insurance Processing, New Business*

» *Responsible for all account openings, transfer requests, insurance quoting, processing & servicing, implementing new investment strategies, and general client service requests.*

Advisory services are offered through SimplePath Wealth Management, LLC, a Registered Investment Advisor in the State of Florida. Insurance products and services are offered through SimplePath Insurance & Tax Planning, LLC, an affiliated company. SimplePath Wealth Management and SimplePath Insurance & Tax Planning do business collectively as SimplePath Retirement.

OFFICE COMMUNICATION & EXPECTATIONS

» If you plan on stopping by our office, please call ahead to let us know to expect you so we can be sure to be available to service you.

» You can always call or text us at (727) 304-6000.

» Or Email us at Service@SimplePathRetirement.com.

» Send secure documents by uploading them to our website at simplepathretirement.com/secure-files.php

» You can also drop materials in our locked mailbox at our driveway entrance

NEW CLIENT MEETING PROCESS & TIMELINE:

- **STRATEGY MEETING** Next 14-21 Days
- **IMPLEMENTATION MEETING(S)** Following 1-2 Weeks
- **ORGANIZATIONAL MEETING** Following 3-6 Weeks
- **EMPLOYEE BENEFITS MEETING** As Needed
- **ASSET PROTECTION, TAXES & LEGACY** Following 1-2 Months
- **FINAL PLAN DELIVERY** Within 6 Months of Onboarding
- **ON-GOING REVIEWS** As Needed, *Based on Service Model*

OUR DEDICATION TO SERVING YOU:

OUR 4 PILLARS OF VALUES

Diligence Authenticity Simplicity Stewardship

WEALTH MANAGEMENT • RETIREMENT PLANNING • INCOME PLANNING

LEGACY PLANNING • TAX REDUCTION STRATEGIES

OFFICE HOURS:

Monday & Evenings: By Appt Only

Tues-Thurs 9am-5pm

Fri 9am -2pm

1951 Nebraska Ave. • Palm Harbor, FL 34683

Service@SimplePathRetirement.com

Call or Text us at (727) 304-6000