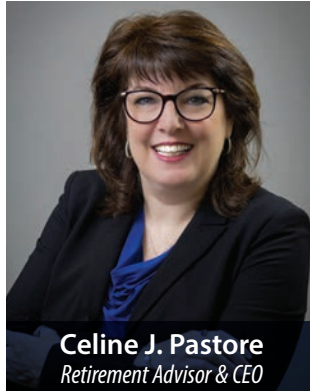




**SIMPLEPATH**  
**RETIREMENT™**  
 Holistic Wealth Management  
 & Retirement Planning

# YOUR DEDICATED TEAM

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

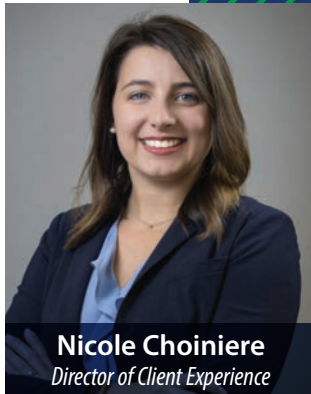


**Celine J. Pastore**  
 Retirement Advisor & CEO



**Max Choiniere, CFP®**  
 Director of Financial Planning

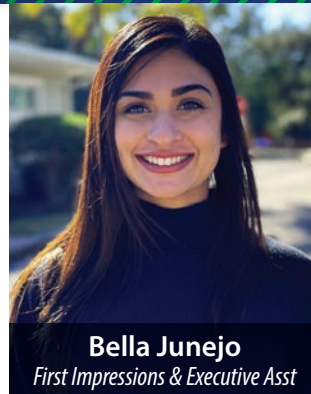
## ADVISORY TEAM



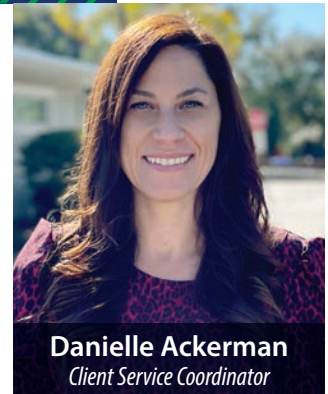
**Nicole Choiniere**  
 Director of Client Experience



**Megan Mills**  
 Marketing & PR Coordinator



**Bella Junejo**  
 First Impressions & Executive Asst



**Danielle Ackerman**  
 Client Service Coordinator

## COMMUNICATIONS TEAM

## RELATIONSHIP 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:

**Retirement Advisor & CEO: Celine J. Pastore, CRPC®, MRFC®**

» Lead advisor, owner & chief compliance officer, oversees and manages all financial planning and insurance services of the firm.

**Dir. of Financial Planning: Maxime (Max) B. Choiniere, CFP®**

» Assists Celine with all meetings, research & preparation, prepares all financial plans for the firm.

**Dir. of Client Experience: Nicole Choiniere**

» Office manager, additionally manages all events, referrals and scheduling of new client relationships.

**Marketing & PR Coordinator: Megan Mills**

» Manages client newsletters, email notices, social media & manages Celine's media appearances.

**First Impressions & Executive Assistant: Bella Junejo**

» Celine's executive assistant, manages the front office & client scheduling, creates "Ritz Carlton" experience for visitors.

**Client Service Coordinator: Danielle Ackerman**

» Manages all client insurance & investment account opening, account updates, investment changes and withdrawals.



# 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 and provide a safe experience.
- » You can always call or text us our office at (727) 304-6000.
- » Or email our team at [Service@SimplePathRetirement.com](mailto:Service@SimplePathRetirement.com).
- » Send secure documents by uploading them to our website at [simplepathretirement.com/secure-files.php](http://simplepathretirement.com/secure-files.php)
- » You can also drop materials in our locked mailbox at our driveway entrance.

## NEW CLIENT MEETING PROCESS & TIMELINE:



## OUR DEDICATION TO SERVING YOU:

## OUR 4 VALUE PILLARS



Excellence



Authenticity



Simplicity



Stewardship

**INCOME PLANNING • WEALTH MANAGEMENT • TAX REDUCTION STRATEGIES**  
**HEALTHCARE PLANNING • LEGACY PLANNING**

### OFFICE HOURS:

Mon, Wed & Evenings: By Appt Only  
Tues & Thur: 9am - 5pm  
Fri: 9am - 2pm

1951 Nebraska Ave. • Palm Harbor, FL 34683  
[Service@SimplePathRetirement.com](mailto:Service@SimplePathRetirement.com)  
Call or Text us at (727) 304-6000