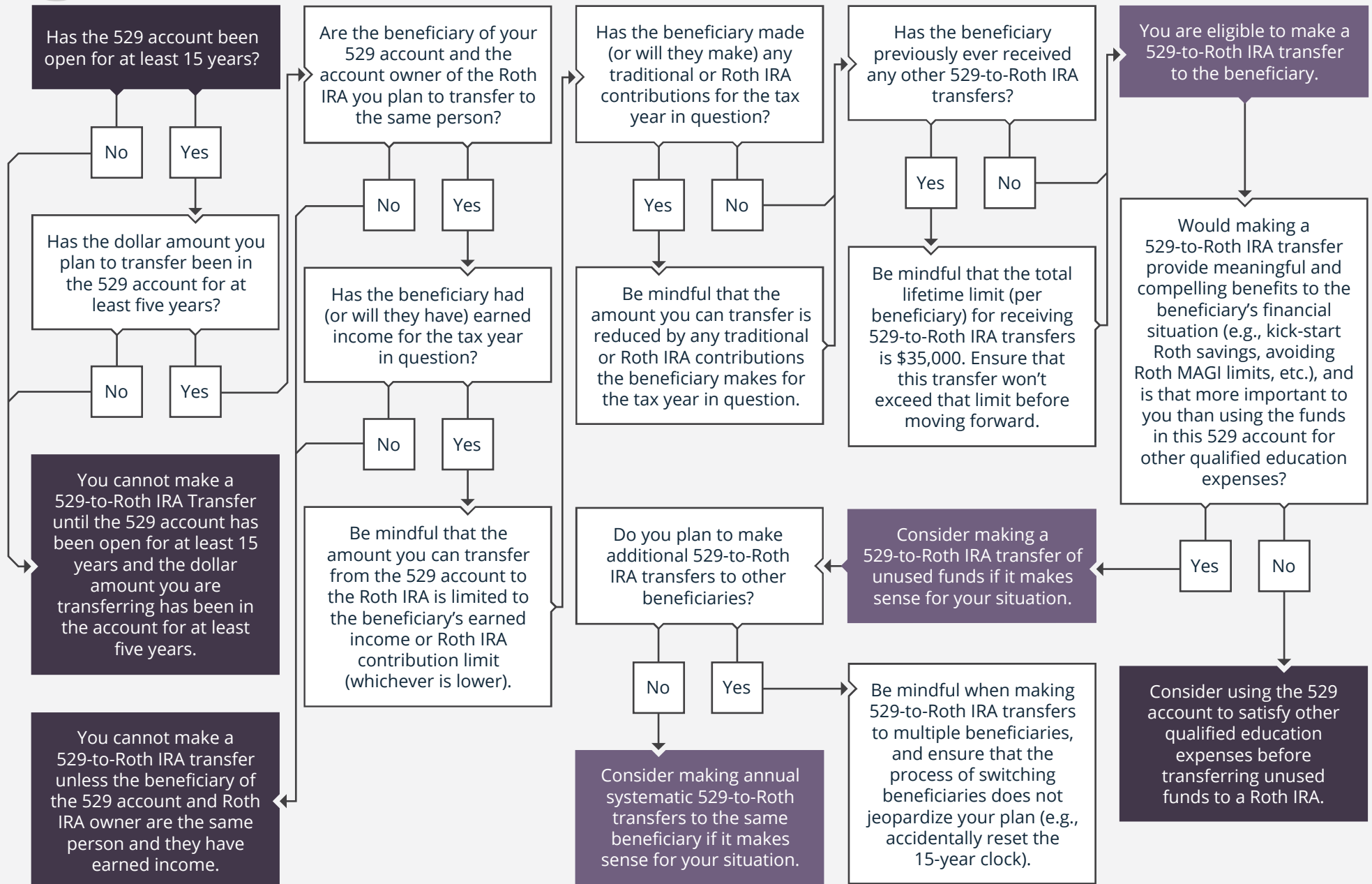


2024 · CAN I MAKE A 529-TO-ROTH IRA TRANSFER?



Start Here





Grow your wealth with confidence. By applying a proven financial process to your life.



We know how confusing financial decisions can be. It's not something you're taught. So, you're forced to piece together financial information from sources with their own bias—and no accounting for your life. But with a trusted guide to provide personalized advice to filter current trends and help you follow a proven financial framework, you can make the most of your financial resources.

Learn more by visiting our website at www.okeefestevens.com

Or, schedule a meeting with Justin by visiting www.calendly.com/justinstevens.

Justin Stevens, Certified Financial Planner

One Bausch and Lomb Place, Suite 920

justin@okeefestevens.com | 585-340-6538 | www.okeefestevens.com