

Having over 25 years of experience in the industry, I have come across a lot of business owners who are completely in the dark about what the retirement plan provider offers.

Hi, I'm Pete Jelacic and I'm a senior wealth manager at SVA Plumb Financial. Some of the things I like to talk about are making sure that the plan works for you and not you for the plan. You also want to make sure the employees are getting the education they need to make informed investment decisions. So if you'd like for me to come out and speak to your group and shed some light on these topics, please contact Speaker Source.