

OFFICE TID-BITS!
Highlights of our staff and families
outside the office...



HALLOWEEN WINNERS!
Congratulations to John & Lisa!



THE PERSONAL BENEFIT FINANCIAL AND ROUNTREE & ASSOCIATES FAMILY

~ SHARLA, ERIC, RON, MELISSA, ED, REGINA, JILL, LYNNAE, KAREN, BRYAN AND KC ~

This is for general information only and is not intended to provide specific investment advice or recommendations for any individual. It is suggested that you consult us, your attorney, or tax advisor regarding your individual situation.

Securities offered through Kestra Investment Services, LLC, (Kestra IS), member FINRA/SIPC. Investment Advisory Services offered through Kestra Advisory Services, LLC, (Kestra AS) an affiliate of Kestra IS. Financial planning offered through Personal Benefit Financial. Rountree & Associates doing business under Personal Benefit Financial is not affiliated with Kestra IS or Kestra AS. Neither Kestra IS nor Kestra AS provide tax or legal advice.

Investor Disclosures: <https://www.kestrafinancial.com/disclosures>