

# **T**RANSITIONAL WEALTH STRATEGIES

## WHAT WE DO



RETIREMENT



**INVESTMENTS**





## TRANSITION PLANNING

**AN INVESTMENT IN KNOWLEDGE PAYS THE BEST  
INTEREST. –BENJAMIN FRANKLIN**

**WHO WE ARE**



**JACQUELINE M. LAKOCY, CFP®, CDFA®**

CEO & Founder

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## OUR BUSINESS RELATIONSHIPS



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