Pittenger & Anderson, Inc.
REGISTERED INVESTMENT ADVISOR

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Behind the Scenes at P&A: Complimentary Services
By Hannah

It's time once again to go backstage at P&A! In addition to managing investment accounts and developing financial plans, we also offer an array of complimentary services to our clients. We actually reviewed one of these services in last month's Behind the Scenes installment, and in this post, we'll be taking a slightly deeper dive into a few more of these offerings and exactly how your P&A team helps.

Outside Investment Accounts

We don't just do research for and review solely your accounts with P&A; we take a look at outside investment accounts for our clients, too. Whether it's an employer retirement plan at your current place of employment or the 529 accounts for your kids, we will browse the fund offerings for these accounts and give you our recommended picks. Additionally, if you have an old employer retirement plan for which you'd like to explore your options, we can also review this for you, explain the options specific to your situation, and make a recommendation for these monies with your best interest in mind. (We're a full-time fiduciary!)

Donor-Advised Funds

One of the five uses of money is the option to give your money away. You can do this through what's called a Donor-Advised Fund (DAF), a type of charitable investment account that offers a variety of tax advantages and allows you to stretch your charitable dollars further than you would giving away cash. Elizabeth and Kristin can help facilitate the opening of such an account and your Lead Advisor can talk strategy regarding the investment piece. Then, when you want to make a grant (gift) from your DAF to a charitable organization, simply call Elizabeth or Kristin with your request and they'll handle the rest!

Medicare Enrollment & Options

Are you age 65 and need help enrolling in Medicare? Or have you already enrolled in Medicare but want to review your coverage? Diane and Elizabeth can help. They are licensed SHIP counselors (read: not salespeople) who can provide unbiased opinions on your Medicare options. Twice a year, in fall and spring, they diligently attend training to keep up to date for our clients and complete a recertification exam once a year, too. In 2020, they saved our clients over $100,000 in Medicare premiums and drug costs!

Meeting with the Next Generation

Whether it's facilitating a discussion between family members regarding the eventual distribution of family assets or simply showing your children the value of investing early on, we are happy to meet with the next generation(s). We can customize these meetings to your desires/their needs and will never disclose information about your portfolio at P&A (unless you give us explicit direction to do so). If your children want to open new investment accounts or have existing accounts they'd like us to manage, account minimums will not apply - we will meet them where they are.

To learn about more of the complimentary services we offer to our clients, click here. If you have additional questions or want to know more about specific ways we can help you on your financial journey, please don't hesitate to reach out. And, as always, thanks so much for reading!

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