

--Testimonial for Kris Hoffman—

I love my financial advisor!

Her expert guidance has helped me to successfully convert a 401k account into a Roth-IRA account with Ameriprise Financial.

Initially, her guidance helped me minimize the tax-implications while continuing to grow my nest-egg through monthly contributions and a successful investing strategy.

In recent months, I have become more adept in handling my investments, and I can conduct my own research and move my investments to maximize returns. Kris has been instrumental in providing me with knowledge about investment strategy and an operational understanding of the Ameriprise on-line system.

Kris is friendly, easy to work with, and very knowledgeable. If you are seeking a financial advisor, please consider Kris. I give her my highest recommendation.

Nathan Marks
Herkimer, LLC