Who to contact list

Red Rose Investment Group

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Senior Portfolio Manager – Portfolio Focus
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Senior Investment Associate
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Based on a relationship of mutual trust, we help our clients attain and maintain a secure lifestyle and achieve success in reaching their lifetime goals.

We understand that situations arise, whether an opportunity or a challenge, and our team strives to provide exceptional service when you need it most. Please see below for some common topics and our who to contact list as an easy resource to ensure you have your questions answered efficiently.

We look forward to serving you.

Topic	Team member
529 accounts	Hope
Address changes	Hope/Brandi
Cash movement (ACH and wire transfers)	Hope/Brandi
Estate planning	Jim/Kurt
Insurance evaluation	Jim/Kurt
Lending (home, business and securities backed)	Jim/Kurt
Litigation paperwork	Hope/Brandi
Monthly income reports	Hope/Brandi
Notary services	Hope
Online access (us.rbcwealthmanagement.com/redroseinvestmentgroup)	Hope
Referrals	Jim/Kurt
Required minimum distributions	Hope/Brandi
Social Security planning	Kurt
Special events (seminars & events)	Hope
Statements	Hope/Brandi
Tax information (cost basis)	Hope/Brandi
Team website us.rbcwealthmanagement.com/redroseinvestmentgroup)	Hope
Transfer process	Hope/Brandi
Trust services	Jim/Kurt
WealthPlan	Jim/Kurt
Other issues	Hope/Brandi

Non-deposit investment products offered through RBC Wealth Management are not FDIC insured, are not a deposit or other obligation of, or guaranteed by, a bank, and are subject to investment risks, including possible loss of the principal amount invested.

RBC Wealth Management does not provide tax or legal advice. We will work with your independent tax/legal advisor to help create a plan tailored to your specific needs.

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