

The News You Need to Know



Left to right: Andrew Woolley, Andrew Barninger, Christopher Miller, Steven Bell and Alan Loss.

We are honored to once again support the Lancaster County Council of Churches on behalf of our clients.



The entire Personal Wealth Advisory Team wishes you all a wonderful holiday season.



Personal Wealth Advisory, LLC

Wise strategies for your wealth and your life

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After over 17 years with Personal Wealth Advisory, Vivian Heinzman has decided to retire. Although her initial responsibilities were focused on helping Alan's clients, over the years her role expanded to include technology, and she became a valued resource for all clients. For the past two years, she has worked part time on special projects.

Although we will miss her, we are happy for Vivian as she moves into the next phase of her life. She looks forward to traveling (preferably some place warm!) to visit friends and family.

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