The News You Need to Know

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

Make the Best of Quarantine – Part 2

To view the video, click on the image. You will be directed to the video on our YouTube channel.

What You Need To Know About Our Office As Lancaster Begins Re-Opening

As Lancaster County moves into the "Yellow" phase of the COVID-19 reopening process, we want to address how our office will operate during this time. Of course, we have and will continue to follow Pennsylvania and federal health and safety guidelines. Like you, we are very much looking forward to a gradual return to normalcy. However, we know that this is a process that will take some time.

Nothing is more important to us than the health and well-being of our clients, their families, and our team. We believe that the best way to serve you safely is to continue to meet by phone or video call. The fewer people we have in our office, the lower the possibility of a client or one of our team members coming into contact with the virus and passing it along to loved ones unknowingly.

We are committed to doing everything possible to accommodate your needs and provide the best service possible regardless of how we meet.

When necessary, we can hold a limited number of meetings in our office. Our team will carefully clean and sanitize the office and meeting rooms before and after each meeting. For your safety, our advisors will wear masks during in-person meetings, and we ask that you do the same.

There will be a box in the vestibule where you may drop off forms, checks, and other paperwork.

Our team members will alternate days working in the office. This means that when you call to reach an advisor or staff member, they may be in the office and available to take your call. But if not, we will relay your message, and you will be contacted shortly.

As always, please give us a call if you have any questions. Thank you for helping us keep everyone safe. We can't wait to see you face-to-face as soon as it is safe to do so!

Yours in service,
The Personal Wealth Advisory Team

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Wise strategies for your wealth and your life

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