Ameriprise Financial

The right financial advisor may be closer than you think.

Peter Weinbaum CFP®, CDFA®, MBA,
Financial Advisor, Vice President
Ameriprise Financial Services, LLC

Experience You Can Count On

Specializing since 2003 in comprehensive financial planning, investments, insurance & annuities, funding for education and retirement plans for small businesses (e.g. 401K, SEP, SIMPLE).

Earned the CERTIFIED FINANCIAL PLANNER™ designation, the standard of excellence in financial planning. He also holds a CDFA® (Certified Divorce Financial Analyst®) to help those considering the financial aspects going through divorce.

Attended the University of Wisconsin BA Economics, University of Illinois MBA and the University of Pennsylvania Wharton School for their Retirement Planning Specialist Program.

Ameriprise Client Experience Award, 2020–2022

Why Ameriprise Financial

- Ameriprise Financial is a longstanding leader in financial planning and advice for over 125 years.
- Ameriprise Financial is ranked No. 289 on the FORTUNE 500®
- More than 2 million individual, business and institutional clients

Value Proposition

I provide personalized financial advice to help you achieve your goals, today and in the future. Together, we'll document your goals, track your progress and adjust to whatever life brings — both the expected and the unexpected. With regular reviews of your goals, anytime access to your investments, and digital tools to help you stay on track, I can help you feel confident, connected and in control of your financial life.

Strong & Stable, Comprehensive Financial Advice.

Areas of Focus

- Financial Planning
- Retirement Plans 401(k), SEP, SIMPLE etc.
- Investments
- Insurance & Annuities
- Retirement Income Strategies
- Divorce Planning (CDFA®)
- Funding for Education

Ideal Client

- Individuals/Couples that are over 45-50 years old and have never done a comprehensive financial plan to build the roadmap to reach their retirement goals
- Divorcees or Widowers where the previous spouse may have managed the financials and the relationships with the CPA, CFP, Banker & Attorney and need the extra transition assistance with as well as a roadmap and planning for retirement, investments, protection (i.e. insurance) children's education, social security, tax reduction & estate planning
- Small businesses from 1-500 employees who would like to consider setting up a retirement plan for their employees.

Best Referral Partners

Current Clients, CPA's, Divorce Attorneys, Business Owners, HR Directors

Complimentary 30 Minute Initial Consultation

I would like to offer a complimentary consultation to discuss whether I can be of value to you. Call me at ***770-497-5755,*** *or email* ***peter.weinbaum@ampf.com***

The initial consultation provides an overview of financial planning concepts. You will not receive written analysis and/or recommendations.