



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.

*Company founded June 29, 1894. * FORTUNE Magazine, Fortune 500 ranking published June 2023 is based on 2022 total revenue. *Company Reports. Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with plaque design) logo in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements. The Ameriprise Client Experience Award is earned by a practice based on three measurable statistics that reflect the value of goal-based advice to our clients: client experience rating; percentage of clients over a certain asset level in advice relationships; and, once the practice has exceeded a minimum amount of net flows, the percentage of net flows derived from assets under management. **Investment products are not insured by the FDIC, NCUA or any federal agency, are not deposits or obligations of, or guaranteed by any financial institution, and involve investment risks including possible loss of principal and fluctuations in value.** Ameriprise Financial cannot guarantee future financial results. Investment advisory products and services are made available through Ameriprise Financial Services, LLC, a registered investment adviser. Ameriprise Financial Services, LLC. Member FINRA and SIPC. © 2023 Ameriprise Financial, Inc. All rights reserved.