

## Jones, Tricia A.

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**From:** Jones, Tricia A.  
**Sent:** Wednesday, January 03, 2018 1:55 PM  
**To:** Jones, Tricia A.  
**Subject:** ALA Charlotte Chapter Meeting - 1/17/18

Please join us for our monthly ALA Charlotte Chapter meeting at noon on January 17<sup>th</sup> at Alston & Bird (101 South Tryon Street, Suite 4000, Charlotte, NC 28280). An Outlook appointment will follow this email. **It is necessary to accept or decline the Outlook appointment by January 12.** The responses will determine how much food is needed for the meeting.

Jennifer J. Winstel and Gordon Whittaker, Financial Advisors from Merrill Lynch, will be presenting *Planning for the New Age of Retirement*.

Jennifer focuses on delivering a comprehensive approach to managing wealth that begins with listening to a client's needs and helping to ensure every strategy is grounded in understanding what each client wants to achieve. Her access to the investment insights of Merrill Lynch and banking convenience of Bank of America helps address the various aspects of clients' financial lives. She is driven by her passion for delivering excellent service and helping clients pursue their goals.

Gordon joined Merrill Lynch in 2003 after beginning his career at another brokerage group. His focus within the team includes financial strategies and investment management for high-net-worth individuals. In addition to client relationship management duties, Gordon has trained financial advisors across the country through the firm's Peer-to-Peer National Faculty program. He holds the CERTIFIED FINANCIAL PLANNER<sup>TM</sup> certification awarded by the Certified Financial Planner Board of Standards, Inc.

Cost for members is \$20 and the cost for non-members is \$25.  
Checks should be made payable to ALA Charlotte Chapter and submitted to  
Adam Ledford  
Winstead PC  
201 N. Tryon St.  
Suite 2000  
Charlotte, NC 28202

This information is also available on the Charlotte Chapter's website calendar at [www.alacharlotte.com](http://www.alacharlotte.com).



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