



PLANNING CENTER

Sheri is a Financial Advisor with Preferred Planning Associates of Dayton, and is security licensed in Ohio. She has been advising Hancock Federal Credit Union members for over 20 years and has been in the Financial Services Industry for over 40 years.



A regarded speaker Sheri has conducted many educational seminars throughout Ohio, addressing Corporate as well as Small business owners, their employees, retired and retiring individuals, also students of Findlay College. Sheri has moderated and attended several LUTC classes, and continues her education of the industry, as a whole every year.

Sheri is security licensed and provides financial planning, and investment advice. Working as a fee based planner she offers direct & no load managed accounts, as well as services and products of many different insurance companies. This gives her the ability to customize her services to meet each individual's or business' needs and situation.

Sheri specializes in retirement planning and 401-k rollovers, yet works in all areas of financial planning.

Because we value our members and care about meeting ALL of your financial needs we encourage you to give Sheri a call. She is happy to answer questions and would welcome an appointment with you. You may schedule a no cost or obligation appointment at either of our office locations at your convenience. So call Sheri today and review the many ways she might assist you in your securing your financial future.

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