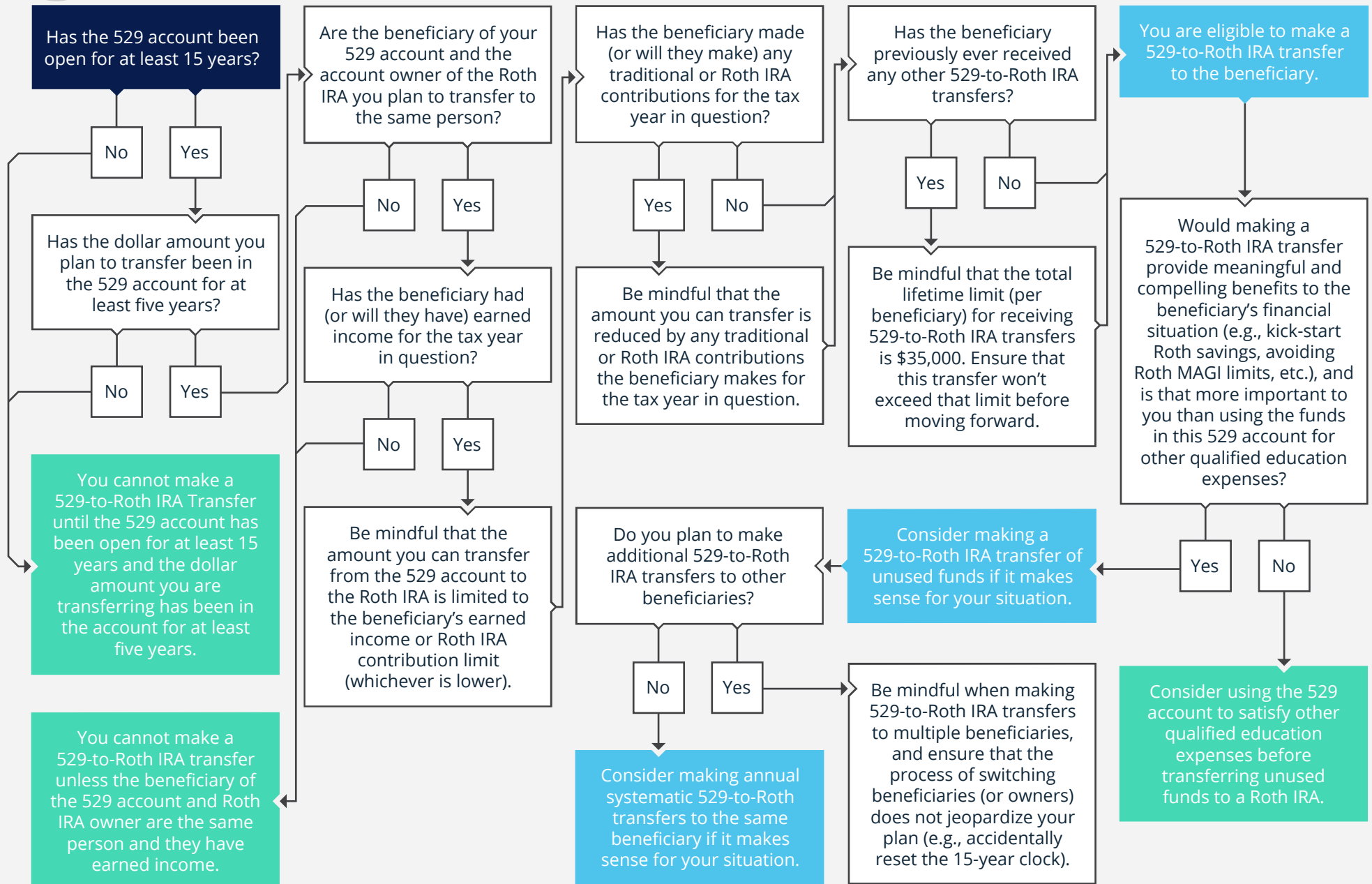


2024 · CAN I MAKE A 529-TO-ROTH IRA TRANSFER?

Start Here



Rest Assured, We Have a Plan



Securities offered through Kestra Investment Services, LLC (Kestra IS), member FINRA/SIPC. Investment advisory services offered through Kestra Private Wealth Services, LLC. PROVISTA WEALTH ADVISORS is a member firm of Kestra Private Wealth Services, LLC, an affiliate of Kestra IS. PROVISTA WEALTH ADVISORS and Kestra IS are not affiliated. [Investor Disclosures](#)

Trading instructions sent via email, fax, or voicemail will not be honored. There is no assurance that these messages can be retrieved on a timely basis, nor is there any sure method of confirming the customer identity.

The information contained in this message is being transmitted to and is intended for the use of only the individual(s) to whom it is addressed. If the reader of this message is not the intended recipient, you are hereby advised that any dissemination, distribution or copying of this message is strictly prohibited. If you have received this message in error, please immediately delete.

Clarke Smith, Managing Director

40 W Broad St Suite 510

clarke.smith@provistawealth.com | 8646962410 | www.provistawealth.com