



Meet The Salkins Group



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- Problem resolution
- Updating bank account
- Urgent requests
- Requesting money
- Scheduling a meeting or call
- Not sure who to call? Start with me.



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- New account setup
- Retitling accounts
- Account transfers
- Retrieving 1099s or statements, change of address or beneficiary, password resets, accessing accounts online or going paperless



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- Investment and planning related inquiries
- Setting up or updating financial planning portal

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