



## **Karen B. Meriwether, CFP®**

**Senior Vice President**

**John G. Ullman & Associates, Inc.**

**51 East Market Street**

**Corning, New York 14830**

**Phone (800) 936-3785 ext.-128**

**Phone (607) 936-3785 ext.-128**

**Fax (607) 936-8361**

**meriwetherk@jgua.com**

***As a former math teacher, Karen utilizes the logical and systematic problem-solving approach of mathematics in the financial management and planning process. She does this all with a sense of humor and personal warmth.***

### **Credentials**

- Elmira College, MS
- Baylor University, BS
- Certified Financial Planner®
- Member of the Financial Planning Association
- 25 plus years veteran in Financial Services

### **Community Service**

- Karen currently serves as Vice President on the Board of Directors of the Steuben ARC Foundation.
- Spark Plug Award—Community Foundation of the Elmira, Corning Area

### **Background**

Over twenty five years ago Karen made a decision to make a career change and enter the financial management field — she never looked back. Today she thrives on the endless challenges the field has to offer. She enjoys the scenic beauty of Keuka Lake with her husband, Tom Snow, as well as the visits from their children and grandchildren. She is an avid gardener and fitness enthusiast.

### **Areas of Expertise**

- Retirement Planning
- Survivorship Analysis
- Risk Management
- Asset Allocation
- Charitable Gift Planning
- Post-Mortem Planning
- Estate Planning

