



## **Peter J. Winnett, CFP®** **Vice President**

**John G. Ullman & Associates, Inc.**  
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***For over twenty-five years  
Pete has helped families and  
business owners meet their  
financial objectives. He  
whole-heartedly believes  
that each individual has  
unique needs and under-  
standing those needs are  
necessary in crafting  
and maintaining  
financial solutions.***

### **Credentials**

- State University of New York at Geneseo  
BS in Management Science,  
Concentration in Finance
- Certified Financial Planner®

### **Community Service**

- Corning Rotary Club and Rotary International  
District 7120 Permanent Fund Committee  
Past Director/Officer
- Corning Community College General Business Advisory Board

### **Background**

Pete is dedicated, intense and analytical. These key qualities teamed with his warm and friendly style make him a highly valued member of the Ullman team. Pete joined John G. Ullman & Associates, Inc. in 1997 and has assumed ever-increasing levels of responsibility. In addition to serving clients, Pete also manages selected key projects for the firm.

### **Areas of Expertise**

- Retirement Planning
- Establishing Financial Plans
- Investments: Asset Allocation and strategic decisions
- Tax Planning
- Estate Planning

