



DRAFT FOR APPROVAL

### **Uhler and Vertich host BNY Mellon financial expert**

FORT MYERS, Fla. (March 19, 2020) – Uhler and Vertich Financial Planners with Scott White Advisors invited clients to meet Brian Ferguson, BNY Mellon senior portfolio manager, during “The Experts Speak,” an annual program that features financial authorities. Ferguson shared information about his firm, investment philosophies, ownership and objectives.

“We invite our clients to gather each year to broaden their investment knowledge and meet the people who manage their money,” said Tom Uhler, founder and principal of Uhler and Vertich Financial Planners.

Ferguson joined BNY Mellon in 1997 and has two decades of experience as an investment and security analyst. He holds a BA in economics and international relations from Bucknell University and an MBA with a concentration in finance from Columbia Business School.

Uhler and Vertich Financial Planners, an independent registered investment advisory firm founded in 2002, is dedicated to the success of its clients’ personal, family, financial and charitable goals. The firm’s advisors assist families in becoming and remaining financially independent with comprehensive plans designed to help maximize income, minimize taxes, protect against the unexpected and provide for the efficient transfer of accumulated wealth. Securities are offered through Raymond James Financial Services Inc., member FINRA/SIPC. To learn more about the team, located at 1510 Royal Palm Square Blvd. #103 in Fort Myers, visit [www.uhlerandvertich.com](http://www.uhlerandvertich.com) or call 239-936-6300.

Investment advisory services are offered through Uhler and Vertich Financial Planners. Uhler and Vertich Financial Planners is not a registered broker/dealer and is independent of Raymond James Financial Services.

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