

Your Guide to Financial Wellness



INVESTING.

It's about more than money. It's about your future.
Helping you pursue your financial goals.

Pictured from left to right:

Jim Williams, AIF®

Senior Vice President/Investments, Branch Manager

Chris Simms, AIF®

First Vice President/Investments, Assistant Branch Manager

Jennifer Karns

Senior Registered Client Service Associate

Michael Dulaney

Financial Advisor

Heidi Malys

Client Service Associate

STIFEL | Williams Simms Wealth
Management Group

(814) 432-3169 main | (800) 344-0256 toll-free

1284 Liberty Street | P.O. Box 1060 | Franklin, Pennsylvania 16323

Stifel, Nicolaus & Company, Incorporated | Member SIPC & NYSE | Stifel.com

Priority First
FEDERAL CREDIT UNION

Experience the Credit Union Difference!

- ✓ Better Rates, Lower Fees
- ✓ Local, Personalized Service
- ✓ In-House Mortgages
- ✓ Online & Mobile Banking

CONTACT US

📞 1-814-797-5768

📍 778 Beatty Ave, Knox, PA 16232

🌐 priorityfirstfcu.org



Federally insured
by NCUA.



Three Ways to Leave Your Legacy

A planned gift to Northwest Hospital Foundation is easy and changes the lives of patients and their families for years to come. It costs you nothing today and makes all the difference in our community tomorrow.



1

BEQUEST

Remember Northwest Hospital Foundation through your will.

2

IRA

Name Northwest Hospital Foundation as a beneficiary on a retirement account.

3

CHARITABLE REMAINDER TRUST

Create an income stream for your life while also making a gift to Northwest Hospital Foundation

There are many additional gift options to choose from including life insurance, gifts of real estate, and gifts of stock.

For more information about making a legacy gift to Northwest Hospital Foundation, please contact Executive Director Theresa Edder at edderta2@upmc.edu or 814.676.7145.



NORTHWEST

HOSPITAL FOUNDATION

Funding excellence in local healthcare

814-676-7145 • northwesthospitalfoundation.org

Theresa Edder, Executive Director • edderta2@upmc.edu