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**Media Contact:** Keith Metz-Porozni, R/West  
[keithm@r-west.com](mailto:keithm@r-west.com) / 971-506-7769

## **LAURA PEDRONCELLI COMPLETES ADVANCED ESTATE PLANNING INSTITUTE PROGRAM**

**Santa Rosa, Calif. – Sept. 23, 2014** - Laura Pedroncelli recently completed the Advanced Estate Planning Institute Program. Pedroncelli is a Raymond James Financial Advisor located at **Addison Avenue Investment Services**, the investment services program of **First Tech Federal Credit Union**, and is affiliated with the Financial Institutions Division of Raymond James Financial Services, Inc. (RJFS) member FINRA/SIPC.

The Advanced Estate Planning Institute (AEPI) is a three-day program for Financial Advisors on developing strategies and recognizing opportunities within the estate planning, philanthropy and wealth management process and how to leverage this new knowledge to serve the needs of their clients. Among the topics covered are the changing federal estate tax\* laws, strategies for high-net-worth families, long-term care alternatives, irrevocable trusts and charitable techniques.

“Through this program, our Financial Advisors gain a deeper and broader understanding of the estate planning process and strategies to facilitate the passing of wealth while potentially minimizing the impact of taxes for high-net-worth families,” said Patrick Daxon, Vice President of Raymond James’ Wealth, Retirement & Portfolio Solutions group.

The Raymond James Institute of Finance provides ongoing education and professional development for the firm’s more than 6,000 financial advisors and their assistants. The institute’s wide-ranging curriculum encompasses many technical disciplines in the financial services industry. It is designed to enable the Financial Advisor to recognize, quantify, illustrate and solve financial planning problems of clients and prospects and is a key to providing high quality advice and superior customer service.

*\*Please note, changes in tax laws or regulations may occur at any time and could substantially impact your situation. While our advisors are familiar with the tax provisions of the issues presented herein, they are not qualified to render advice on tax or legal matters. You should discuss any tax or legal matters with the appropriate professional.*

### **About Addison Avenue Investment Services**

Addison Avenue Investment Services is the recognized investment services program of First Tech Federal Credit Union. Initially launched in 1998 to serve the investment needs of Hewlett-Packard employees, Addison Avenue Investment Services has grown to the largest credit union investment program in the nation, with Raymond James Financial advisors managing \$2.97 billion in assets for First Tech’s 360,000 members. There are more than 30 Raymond James Financial Advisors operating in 40 First Tech branches across eight states.

Raymond James Financial Advisors offer securities through **Raymond James Financial Services, Inc.** Member FINRA/SIPC and securities are not insured by credit union insurance, the NCUA or any other government agency, are not deposits or obligations of the credit union, are not guaranteed by the credit union, and are subject to risks, including the possible loss of principal. Raymond James is not affiliated with First Tech Federal Credit Union or Addison Avenue Investment Services.

Registered branch address: 1011 Sunset Blvd, Rocklin, CA 95765. Phone: 855.744.8585.

**About First Tech Federal Credit Union**

First Tech Federal Credit Union is a \$6.5 billion institution headquartered in Mountain View, Calif. It is the nation's premier credit union serving the world's leading technology-oriented companies and their employees, including HP, Microsoft, Agilent, Intel, CISCO, Amazon, Nike, CH2M HILL, Intuit, Google and more. First Tech is recognized as the industry catalyst for delivering effortless banking experiences to its 360,000 members through its 40 branch locations, more than 5,000 CO-OP Shared Branch locations, 30,000 CO-OP Network ATMs and 286,000 ATMs nationwide. First Tech offers a full range of banking services, including traditional banking, mortgage, financial planning and insurance services. For more information, visit [firsttechfed.com](http://firsttechfed.com).

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