



Schaffer & Company Asset Management, Inc.



Schaffer Accounting & Tax Services
Beacon of Light Financial Services, Inc.
Schaffer & Company Financial Services
Schaffer Wealth Preservation & Capital Management

Gregory L. Schaffer, Sr.

Certified Financial Planner-CFP®

Registered Financial Consultant-RFC®

Registered Mortgage Broker-NYS Banking Department
New York State Licensed Real Estate Broker, REALTOR®
New York State Licensed Property & Casualty Broker
New York State Licensed Property & Casualty Agent
NYS Licensed Life, Accident & Health Agent
NYS Licensed Variable Life/Annuity Agent
Professional Trustee/Executor

Beacon of Light Realty USA
Schaffer & Co Exotic Motorcars
The Gregory L. Schaffer Insurance Agency, Inc.

Professional Designations, Licenses & Corporate Officer Disclosures

As a disclosure to the undersigned, client acknowledges that Gregory L. Schaffer, Sr. holds the following licenses, designations, registrations and corporate officer positions:

Certified Financial Planner-CFP®

Authorized by the Certified Financial Planner Board of Standards
Registration #115958



Registered Financial Consultant-RFC®

Appointed by the International Association of Registered Financial Consultants
Registration #12931

Registered Investment Advisor-RIA

Schaffer & Company Asset Management, Inc.
Registered with New York State Attorney General's Office
FINRA CRD # 138463

Registered Mortgage Broker

Registered with New York State Banking Department, License Number A003898
Company NMLO #67367
Gregory L. Schaffer NMLO #65042

Real Estate Broker, REALTOR®

Licensed in New York State, License #37SC0816795
Member of Greater Rochester Association of Realtors
Member of NYS Association of Realtors and National Association of Realtors

Life, Health Accident, Variable Life, Variable Annuity Agent-Corporate

Licensed in New York State, License #LA-1045198

Internal Revenue Service Tax Professional

PTIN #P00062977

3205 Mount Read Blvd, Rochester, NY 14616
(585) 621-3300 Rochester Office - (585) 621-3331 Real Estate - (585) 621-3334 Facsimile
(949) 313-8884 California Office - (888) 225-1350 Out of State Toll Free

**New York State Department of Taxation & Finance
Tax Preparer Registration #11039535**

Notary Public

Registered in New York State, Registration #01SC4838699

Professional Trustee

Serving entire United States

Professional Executor Services

Serving New York State

Chief Executive Officer-CEO, Chief Investment Officer, President

Schaffer & Company Asset Management, Inc.

Chief Executive Officer-CEO, President

The Gregory L. Schaffer Insurance Agency, Inc.

Chief Executive Officer-CEO, President

Beacon of Light Financial Services, Inc.

d/b/a Schaffer & Company Financial Services

d/b/a Schaffer Wealth Preservation & Capital Management

d/b/a Schaffer Accounting & Tax Services

d/b/a Schaffer & Co Exotic Motorcars

d/b/a Beacon of Light Realty USA

Chief Executive Officer-CEO, President

Facilities Equipment Sales, Inc.

Vice-President

JRD Associates, Inc.