NEWS

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Brian Puckett, JD, CPA/PFS

Local Financial Advisor Offers Web-based Financial Tracking Tool

Brian Puckett, JD, CPA/PFS, Encourages the Use of Comprehensive Financial Strategies

OKLAHOMA CITY, OK (August 29, 2005) – Brian Puckett, principal of Brian Puckett Retirement Advisors, LLC, has announced that he is now offering clients a Web-based tool with which to monitor the details of their comprehensive financial strategy.

A financial advisor for many years, Puckett realized that many affluent clients struggle to coordinate information from the multiple advisors they engage – including financial planners, accountants, lawyers, bankers, etc. “All too often, busy individuals – even investment-savvy and affluent professionals – address their financial planning issues in a piecemeal fashion, rather than with a written game plan,” says Puckett. “The written plan is an important first step, but effectively implementing and monitoring it equally important. The new Web-based tool we’ve set up for our clients provides a professionally-guided and unified solution.”

Since most advisors offer services independent of each another, it’s up to the client to sort out all their ideas and recommendations. This Web-based solution enables people to organize all of their advisors and their assets and consolidate them in one place where they can view all their financial accounts, copies of tax and legal documents, insurance policies, and their specific goals and strategic plans. Everything is updated, organized and accessible on demand. All the information is password protected in a secure, encrypted personal Web address, accessible only to the client and his or her financial advisor.

“Professional advice and careful planning are essential elements of wealth protection and enhancement,” adds Puckett. “Along with that, every client should have direct access to current information about their financial situation. This Web-based solution provides exactly that.”

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About Brian Puckett Retirement Advisors, LLC

Brian Puckett, Principal of Brian Puckett Retirement Advisors in Oklahoma City, Oklahoma, has been serving clients as a financial advisor for over 15 years. A graduate of the University of Oklahoma, holding both a BBA in Accounting and a JD, Brian is a licensed attorney and a CPA. He is an active member of the Personal Financial Planning sections of both the American Institute of Certified Public Accountants and the Oklahoma Society of Certified Public Accountants. He is also an active member of the Financial Planning Association, the nation's largest organization of professionals dedicated to championing the financial planning process. Brian Puckett Retirement Advisors LLC is a Registered Investment Adviser in the state of Oklahoma.

Puckett holds the respected Personal Financial Specialist designation (PFS), awarded exclusively to CPAs who have demonstrated substantial experience in personal financial planning; pass a comprehensive examination; and submit references from colleagues and clients to substantiate financial planning acumen. He has been an adjunct professor at the University of Central Oklahoma and lectures frequently at other educational institutions and area corporations. Puckett also writes a monthly financial column for several local Oklahoma City publications and his articles appear frequently in CPA Focus, published by the OSCPA, and an assortment of Mattison Avenue Publishing Company magazines. His articles have also recently been featured in Financial Planning and Research magazines.

Visit www.puckettadvisors.com for more information about Mr. Puckett and his company.

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