

# NEWS

## FOR IMMEDIATE RELEASE

**Contact:** Brian Puckett, JD, CPA/PFS, CFP®  
Brian Puckett Retirement Advisors, LLC  
(405) 607-4820  
[info@puckettadvisors.com](mailto:info@puckettadvisors.com)



Dennis Packard



Brian Puckett, JD,  
CPA/PFS, CFP®

## Local Firm Adds Financial Advisor

### *Dennis Packard Joins Brian Puckett Retirement Advisors*

[OKLAHOMA CITY, OK, February 22, 2006] Dennis Packard, formerly with the TD Waterhouse branch office, has joined Brian Puckett Retirement Advisors. In addition to his financial advisory responsibilities, Packard will spearhead the firm's business development initiatives.

A financial services professional since 1997, Dennis Packard received his BS in Finance from Oklahoma State University. Prior to joining the firm, Packard was an investment consultant with TD Waterhouse in Oklahoma City and a bond analyst with Dow Jones/Bridge Financial. While still at TD Waterhouse, Packard had been working closely with Brian Puckett, who is a member of the TD Waterhouse AdvisorDirect program, their national referral program for their clients who seek the services of an independent investment advisor. "With the closing of the local TD Waterhouse offices, I was delighted to have the opportunity to bring Dennis into my firm," says Puckett.

Packard is a resident of Edmond. He is a volunteer for the Oklahoma City Public Schools and the Oklahoma Council for Economic Education.

#### **About Brian Puckett Retirement Advisors, LLC**

Brian Puckett, Principal of Brian Puckett Retirement Advisors in Oklahoma City, Oklahoma, has been serving

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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. 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 is also a member of the Financial Planning Association, the nation's largest organization of professionals dedicated to championing the financial planning process, and has earned the right to use the CFP® mark of distinction. Brian Puckett Retirement Advisors LLC is a Registered Investment Adviser in the state of Oklahoma.

Puckett's articles on financial planning appear frequently in CPA Focus, published by the OSCP, and he is often quoted on financial planning topics both in industry and consumer publications, including the Wall Street Journal, Business Week and The Daily Oklahoman. Two nationally-distributed industry magazines, Financial Planning and Research, have published articles written by Puckett for his financial advisory peers. Puckett is also an Advisory Board member of the Paladin Registry, a free service that educates investors about the characteristics of good and bad advisors and provides an objective process for selecting advisors. As a five-star investment professional, Puckett has received Paladin's highest rating. He has been an adjunct professor at the University of Central Oklahoma and lectures frequently at other educational institutions and area corporations.

Puckett was one of just twelve advisors profiled in a newly released book, "The Trust Equation: The Savvy Investor's Guide to Selecting a Competent, Ethical Financial Advisor" (Financial Forum Publishing, December 2005, ISBN 0-9745175-5-0). Please call his office to learn how to obtain a complimentary copy or visit [www.ffbookstore.com](http://www.ffbookstore.com) to purchase The Trust Equation.

Visit [www.puckettadvisors.com](http://www.puckettadvisors.com) for more information about Mr. Puckett and his company

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**NOTE:**

When you need an expert to speak on complicated financial topics in an easy-to-understand and lively way, please call the nationally-recognized advisors at Brian Puckett Retirement Advisors LLC.

~ Thank you!