

Rollstone Investment Services

Helping You Plan A Brighter Future



you & us

Planning your financial future is easier with the right partner

At Rollstone Investment Services, we are committed to helping our clients turn their aspirations and financial dreams into realities. Our dedication is firmly rooted in our goal to provide high-quality, comprehensive financial services in an atmosphere that allows us to get to know you better – your family, your business, your financial goals and your investment needs.

Through our alliance with LPL Financial, our clients have access to a wide array of financial products, including services such as professional money management, retirement and education planning, and investment products including stocks, bonds, mutual funds, annuities and insurance products. LPL Financial is a leading provider of investment and insurance programs to financial institutions across the country, and is a registered broker/dealer, member [FINRA/SIPC](#).



Products & Services

- Stocks & Bonds
- Tax Advantaged Investments
- Mutual Funds

- Business Retirement Plans
- Retirement Planning
- Education Planning & 529 Plans
- Annuities
- Insurance Products
- Professional Asset Management
- Financial & Estate Planning
- Individual Retirement Accounts

To learn more about these and other investment tools, call or stop by your nearest Rollstone Investment Services [branch](#).

[View your brokerage account online.](#)

Securities and advisory services are offered through LPL Financial Services (LPL), a registered investment advisor and broker/dealer ([member FINRA/SIPC](#)). Insurance products are offered through LPL or its licensed affiliates. Rollstone Bank & Trust and Rollstone Investment Services **are not** registered as a broker-dealer or investment advisor. Registered representatives of LPL offer products and services using Rollstone Investment Services, and may also be employees of Rollstone Bank & Trust. These products and services are being offered through LPL or its affiliates, which are separate entities from, and not affiliates of, Rollstone Bank & Trust or Rollstone Investment Services. Securities and insurance offered through LPL or its affiliates are:

Not Insured by FDIC or Any Other Government Agency	Not Bank Guaranteed	Not Bank Deposits or Obligations	May Lose Value
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