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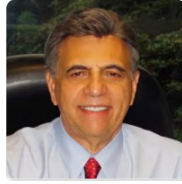


Verify My Membership at: www.ethics.net



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Frank Ragonese Ph.D.

Founder & Managing Member

Member since	09/14/2012
Member through	09/14/2020
Company	Pelican Wealth Advisors, LLC
Address	27499 Riverview Center Blvd, Ste 228, Bonita Springs, FL 34134 US
Website	http://www.pelicanwealth.com
Phone Number	(239) 985-4097
Industry	Registered Investment Advisor
Specialty	Annuities, Retirement Planning, Financial Planning, Insurance

Pelican Wealth Advisors believes in results driven, actively managed portfolios instead of the sleepy "buy and hold" strategies of the past.

Pelican Wealth Advisors are financial advisors, investment advisors, and wealth managers who are passionate about improving the lives of clients through a holistic approach to abundance. Our goal is to ignite and empower our clients to live rich and full lives in wealth and happiness.

Every day we see people who are concerned about outliving their money, are unsure about their resources to cover long term care expenses or who have been reducing their lifestyle out of uncertainty of the future. Common questions are:

- Will I have enough money for the rest of my life?
- Do I have the right investment plan?
- Am I taking too much risk?
- What happens if my health changes?
- When should I turn on social security?
- Should I do a reverse mortgage?
- Should I pay off my house?
- Should I have a trust?
- How can I best preserve my legacy?
- What is the gift tax?

Our goal is to help you set your worries aside and learn how you can have income for life, avoid outliving your money, and leave a legacy to your children. We help you navigate and plan for the uncertainties that we all face. For the many who are contemplating retirement and those who are currently retired and in the asset preservation phase, our retirement planning and retirement strategies can put you on a stronger footing and help you sleep at night.

With a variety of offerings and client experiences, such as educational webinars, wine tastings, and client appreciation events, we build

workshops, wine tastings and client appreciation events, we build relationships with our clients and help them grow their investable assets, enrich their lives, and realize their dreams.

Our principal, Dr. Frank Ragonese, a former college professor, is a great educator, and this skill is a great resource for empowering his clients with knowledge and understanding of financial topics that can otherwise seem daunting, but are so vital to good decision-making.

Pelican Wealth Advisors is a fee-based Registered Investment Advisor firm serving Bonita Springs, Naples, Estero, & Fort Myers, Florida. As a "holistic wealth management" company, we are concerned with your well-being as a "whole". Our goal is to not only help you achieve financial abundance, but to help you achieve happiness and health in all aspects of life.

Our services include:

- Portfolio Development and Management
- 401K Planning
- Investment Management
- Annuities
- Financial Management
- Retirement Planning
- Risk Analysis

We offer complimentary financial planning consultations and invite you to schedule an appointment by dialing 239 985-4097

References

- Rev. Hugh McGuigan, Pastor, Our Lady of Light Catholic Community, 239-267-7088
- Dr. Fred Ebetino, Estero FL, 239-470-1461
- Dr. Jane Kuckel, Estero, FL 239-948-9118
- Al Torello, Naples FL, 239-774-2655
- Patricia Vavrek, Estero FL, 239-425-5188