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Marketing, LLC

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FOR IMMEDIATE RELEASE

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Three L&M advisors earn Fi360 Accredited Investment Fiduciary® designation

AMHERST, NY – L&M Financial’s Senior Financial Advisor, Victor Anastasia and Financial Advisors Mark Anastasia Jr. and Donna Menza have been awarded the Accredited Investment Fiduciary® (AIF®) designation from the Center for Fiduciary Studies®, the standards-setting body for Fi360. Fi360 is a fiduciary education, training, and technology company that helps financial intermediaries to use prudent fiduciary practices to profitably gather, grow and protect their investors’ assets.

The AIF designation signifies specialized knowledge of fiduciary responsibility and the ability to implement policies and procedures that meet a defined standard of care. The designation is the culmination of a rigorous training program, which includes a comprehensive, closed-book final examination under the supervision of a proctor, and agreement to abide by the Center’s Code of Ethics and Conduct Standards. On an ongoing basis, completion of continuing education and adherence to the Code of Ethics and Conduct Standards are required to maintain the AIF designation.

Victor Anastasia is a Chartered Retirement Planning Counselor. He holds FINRA Series 6, 62, 63 and 65 licenses, as well as Life and Health Insurance licenses. He is a graduate of The Wharton School, Executive Program on Financial Retirement Strategy.

Mark Anastasia, Jr. earned a B.S. in Finance from Niagara University and holds a New York State license in Life, Accident, and Health Insurance, as well as FINRA Series 7 and 63 licenses.

Donna Menza is a graduate of the State University of New York College at Buffalo, where she received a B.A. in Economics. She holds FINRA Series 7 and 63 licenses.

All three advisors are Registered Representatives with Securities America, Inc. and work as a team, focusing on the needs of doctors, dentists, healthcare professionals, small business owners, individuals, and families.

L&M Financial representatives have been providing benefit programs and financial services to individuals, families, and small businesses since 1972. The company has offices in Buffalo, Rochester and Binghamton. To set an appointment with Victor, Mark or Donna, or request more information about their services, email vanastasia@lmfs.net or call (716) 839-1234 x 235.

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Securities offered through Securities America Inc., Member FINRA/SIPC and advisory services offered through Securities America Advisors, Inc. L&M Financial and the Securities America Companies are unaffiliated. SAI # 2185576.1

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