

Brannan, Ronald P.

- Associated Financial Advisors
- Retirement & Investment Planning:
 - Lump-sum Distribution Planning; IRA
 - Rollover Planning: IRA, SEP-IRA, SIMPLE-IRA, TSA, 401(k) Retirement Plans.

1827 E. Fir Ave., #110

Fresno.....323-5555

Fax.....323-5353

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