



John G. Ullman
& Associates, Inc.

Comprehensive Wealth Management

MEDIA ADVISORY

FOR IMMEDIATE RELEASE

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RHINEBECK FIRM ADDS TWO LOCAL PROFESSIONALS TO TEAM

Rhinebeck, New York...John G. Ullman & Associates, Inc., today announced that it has added Peter Plevritis of Poughkeepsie and Peta Bartles of Rhinebeck to its practice. The firm provides comprehensive financial services to clients locally, regionally, and nationally, and is based in Historic Rhinebeck (headquartered in Corning, NY).

Plevritis, who resides in the Town of Poughkeepsie with his wife and son, has worked in the financial services industry for 15 years, including Wall Street investment banks, where he acquired experience in trading across domestic and international equity markets, ETFs, and equity derivatives. Plevritis, who provides investment management and trading services to clients, has worked with high-net worth individuals, broker-dealers, financial advisors, portfolio managers, and financial institutions. In his most recent role as a Senior Financial Analyst, Plevritis conducted in-depth research, developed financial projections, prepared business cases, and made recommendations on investments. The St. John's University graduate, currently enrolled in the Master's in Business Administration program at Marist College, is also a longtime community volunteer: past and present affiliations include service as a United Way Loaned Executive and member of Rhinebeck Rotary Club, Rhinebeck Area Chamber of Commerce, Dutchess County Regional Chamber of Commerce, and Hudson Valley Young Professionals. Plevritis will earn designation as a Certified Financial Planner within the next 12 months.

Says Plevritis, "as a longtime resident of the Hudson Valley, I have spent my career helping my neighbors grow and secure their wealth. I am excited to now build on that experience and continue to serve the community I call home with the exceptional support and robust resources of John G. Ullman & Associates."

Also joining the team is Peta Bartles, newly appointed Administrative Assistant for John G. Ullman & Associates. Bartles has lived in Rhinebeck since 1985; she is married to native Steve Bartles, with whom she has two adult daughters. Most recently assistant manager at Rhinebeck Department Store, Bartles, new to the financial services industry, spent early career years as

assistant nursery school teacher and working at Rhinebeck High School. Bartles is also a well-known community volunteer, preparing and serving meals weekly at St. John's Reformed Church in Upper Red Hook to anybody in need of food and/or company through a program started by fellow local Beverly Kipp called Simple Supper. This role is just one of many volunteer positions Bartles has held over the past few decades.

Bartles says of the new position, "it's a real privilege to be working with such wonderful people in the community I love. I look forward to the changes that John G. Ullman and Associates is starting in the new location." (The company is in the process of moving to [18 East Market Street](#) from its current spot at [30 East Market Street](#)).

To learn more about John G. Ullman & Associates, call [845.876.4499](tel:845.876.4499) or visit jgua.com.

About John G. Ullman & Associates

John G. Ullman & Associates, Inc., was founded in Corning, NY in 1978. The firm is a Registered Investment Advisor (RIA) registered federally with the Securities & Exchange Commission. As an independent, fee-based investment management firm JGUA provides comprehensive wealth management strategies and services to their clients. The firm manages nearly \$900 million in client assets. More information is available at www.jgua.com. Follow us on, LinkedIn, Twitter, Facebook and the JGUA Blog.

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