




# PETER J. WINNETT, CFP®


*Vice President  
Senior Advisor*

## CONTACT

 [WinnettP@jgua.com](mailto:WinnettP@jgua.com)

 (607) 936-3720 x157

 [www.JGUA.com](http://www.JGUA.com)

 P.O. Box 1424  
Corning, NY 14830

## EDUCATION/SERVICE

Certified Financial Planner®

State University of New York at  
Geneseo BS Management Science,  
Concentration in Finance

30-Year Member Corning Rotary  
Club including Past Director/Officer

Leadership positions serving on  
various committees for Rotary  
District 7120

Corning Community College General  
Business Advisory Board

## ABOUT

For over thirty years Pete has helped families and business owners define and plan for financial success. He is dedicated and intense, considering his work a vocation. His approach is to develop trusting, two way relationships with the clients he serves as he coaches each individually, providing solutions based upon understanding their needs. This approach, he believes, provides an opportunity to have a positive effect on people's lives.

Pete joined JGUA in 1997 and has remained focused on client relationships and enjoys being a mentor to aspiring advisors.

He is a long-time competitive distance runner, participating multiple times in races such as the Wineglass Marathon, Utica Boilermaker and the Indy 500 Festival Mini-Marathon.

Pete is also an automotive enthusiast and high performance driving participant.

## CONCENTRATIONS

Executive Compensation Planning  
Establishing Financial Plans  
Retirement Planning  
Tax Planning  
Estate Planning  
Investments: Asset Allocation and strategic decisions



John G. Ullman  
& Associates, Inc.  
COMPREHENSIVE WEALTH MANAGEMENT SINCE 1978