



New Office Location Coming in November

The Crossbridge Roundtable provides a chance for you to “listen in” as the owners of Crossbridge Financial Group informally discuss various topics. Please feel free to share this information with others.

Today's discussion centers on this November's move to a new office location.



The Crossbridge owners met recently to discuss their pending move to a new office (from left):

- Tom Minigiello, CFP®
- John Adamczuk, MS, CFP®
- Elizabeth Thorley, MS, CFP®, CLU
- Jerry Randisi, CFP®

2000 Winton Road South
Building 5, Suite 102
Rochester, NY 14618
T 585.292.0430
F 585.292.0779
www.crossbridgefinancial.com

JERRY RANDISI: We have some fairly big news to discuss in this Roundtable session—our plans to move our Crossbridge offices to a new location this November.

TOM MINIGIELLO: Our new offices will be at 290 Linden Oaks Office Park in Pittsford, which is about as easy to reach as possible for people in the Greater Rochester area. It's on Linden Avenue, just off 490 East and only minutes from the 490 and 590 interchange.

ELIZABETH THORLEY: After nearly 13 years in our present location, we were able to take advantage of beneficial circumstances in the commercial real estate market to secure a much nicer office environment for our clients, as well as upgraded working space for us.

JOHN ADAMCZUK: Since our lease was coming to an end, we decided to explore the local market for office space. Given the current economy, we found a highly competitive environment—a “buyers’ market,” if you will.

JERRY: In a way, our experience in the search for office space is not unlike the current situation in the financial markets. When the economy is struggling, cautious-but-wise investors may actually find it a good time to improve their portfolios.

TOM: That's right. We seem to be inundated with negative news these days, but the fact is that a down market often yields some positive opportunities.

JOHN: We also should point out that we have signed a long-term lease in the Linden Oaks location, which is an indication of our confidence in the future.

ELIZABETH: We're also confident that our clients will enjoy the new offices. Our older clients and those with disabilities, in particular, will appreciate the ease of access. There are no steps to negotiate entering the building, and our offices are on the second floor, accessed by an elevator.

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JERRY: There is plenty of parking space and, unlike our present situation, the restrooms will be on the same floor as our offices.

TOM: Linden Oaks also features on-site management, so that if any problems arise they can be dealt with quickly.

JOHN: Linden Oaks currently is home to several national and international corporate and regional headquarters. Some of our new neighbors will include Xerox Corporation, Birds Eye Foods, Morgan Stanley, and Mutual Life Insurance of America.

ELIZABETH: In short, we are pleased and excited to be moving to a new facility where we can continue to provide excellent service to our clients in an upgraded and conveniently located facility.

Refer a Friend To Crossbridge

We've recently heard our clients say they appreciate the steady stream of communications and financial updates that we have been providing during the economic downturn. Many have indicated that now—more than ever—they are glad they relied on the trusted, experienced advisors at Crossbridge.

If you know of others who might benefit from our counsel, please share this Roundtable with them, and ask them to call our office at 585-292-0430 for an appointment.

NFS STATEMENTS AVAILABLE ONLINE

Crossbridge clients now have the option to receive paper statements and trade confirmations online from National Financial Services (NFS) instead of through the regular mail. NFS is the clearing firm where Crossbridge client accounts are carried. Go to www.crossbridgefinancial.com to learn how to sign up for online statements and confirmations, or call Denise Werner at our offices at 585-292-0430, ext. 11.

If you would like to opt out of receiving this communication in the future, please send an email to dwerner@crossbridgefinancial.com.