

Strategic Financial Services - Nancy L. Trela Named Managing Director and Melissa L. Cummings Joins

Monday, February 11th, 2008

Utica N.Y. - Chief Executive Officer, Alan R. Leist, Jr., CFP, and Strategic Financial Services, LLC, Utica, New York, have announced that Nancy L. Trela has been promoted to Managing Director, and that Melissa L. Cummings has joined the firm as a Client Relationship Manager.

Both Trela and Cummings specialize in Financial and Estate Planning for Strategic. Leist comments that "Effective wealth management for people in today's world involves integrating all components of their financial situation to meet their lifetime and estate planning goals. An effective plan that is updated regularly is key to a client's financial progress, and well-being."

Trela joined Strategic in 1995 as the firm's Operations Manager. Prior to joining Strategic, she worked in the Trust Department for Marine Midland Bank as Custody Assistant and Trust Administrator. She also worked for M&T Bank where she served as the Operations Coordinator for their fixed income trading division.

A native of Buffalo, New York, Trela is a 1992 graduate of William Smith College, where she received a Bachelor of Arts degree in Economics and Finance.

Prior to joining Strategic, Cummings was a Corporate Finance Manager for Northland Communications, and has over nine years of experience in financial, managerial and operational positions.

A native of Barneveld, New York, Cummings is a 1998 graduate of the SUNY Institute of Technology, where she received a Bachelor of Science degree in Business Administration and Accounting.

Strategic Financial Services, LLC manages over \$1 billion for individuals, businesses, and not-for-profit organizations. Services are provided through three Strategic companies: Alan R. Leist Planning Group, Inc., Strategic Investment Advisors, Inc. and Strategic Retirement Plans, Inc.; * Securities offered through Cadaret, Grant, and Co., Inc. - Member FINRA/SIPC; Strategic Investment Advisors, Inc. and Cadaret Grant are separate entities.

Company headquarters are located at 114 Business Park Drive, Utica, New York with additional offices in Saratoga Springs, New York, and West Palm Beach, Florida. For more information call 315.724.1776 or 800.937.4461, or visit www.investstrategic.com.



NANCY L. TRELA



MELISSA L. CUMMINGS

Strategic Financial Services, LLC

Investment Management • Financial & Estate Planning • Corporate Retirement Plans

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