

It's Official... We've MOVED!



**1991 Crocker Road, #204
Westlake, Ohio 44145**

We are excited to share that Keystone Financial Planning, Inc., is in the process of relocating our office from Middleburg Heights to Westlake, Ohio! As you read this newsletter, our move is underway. With the stock market closed for President's Day on Monday, February 17th, we have strategically planned this transition to ensure minimal disruption for our financial planning services.

Why did you decide to move office locations?

After careful consideration, we determined it was the right time to move to a new location that better aligns with the needs of our clients and our business. Our new office offers enhanced security, greater convenience, and an environment better suited for working as a team. Located in a lively area, it provides a more accessible and engaging setting. This move allows us to continue delivering the high level of service you expect while ensuring a safe and welcoming space for all who visit.

Where exactly is the new office located?

Our new office is conveniently located at 1991 Crocker Road, Suite 204, in Gemini Building I at the corner of Crocker and Detroit Roads. Situated directly across the street from Crocker Park Shopping Mall, our location offers easy access from multiple highways, including Interstate 90, Interstate 480, and the Ohio Turnpike, making it convenient for our clients and employees.

Parking is free and entrances/exits are off both main streets. The entrance closest to I-90 is off Detroit Rd. across from Bob Evans. There is an entrance off Crocker Road by PNC Bank.

Will anything change with communication?

A few years ago, we transitioned to a Voice over Internet Phone system, enabling us to answer calls from our desk phones, computers, and cell phones. Thanks to this technology, our phone number will remain the same. You can continue to reach us at 440-234-6323 during office hours. If we are on another call or outside of business hours, you are welcome to leave a voicemail and we will get back to you as soon as possible.

Our email addresses will also remain unchanged, and you can continue to access our website and Client Access as usual. Additionally, we offer virtual meeting options via Zoom and Microsoft Teams, allowing clients to connect with us face-to-face from the comfort of their homes. Regardless of where you reside or where we are located, we have a way to connect.

Will KFP receive mail if sent to the Middleburg Heights office?

We will continue to have access to our Middleburg Heights mailbox for an extended period. Any mail sent to our previous address will still reach us. We will be stopping by periodically to collect incoming mail. Eventually, we will arrange for all mail to be forwarded to our new Westlake office.

We appreciate your support during this transition and look forward to welcoming you to our new space soon!