PERSONAL SAGE
Strategic Advice Guidance and Empowerment

ONE-ON-ONE SESSIONS

WHAT IS IT?

Through the Inotiv Inc. Retirement Plan you have a dedicated financial advisor available to offer personal, targeted, fiduciary advice on:

- 401(k) and outside investment allocation
- Insurance
- Rollover assistance
- Annuities
- Retirement planning

WHO IS IT?

Scan the QR code to schedule a one-on-one appointment with Nick.

Nicholas S. Lamb, CFA®
Wealth Advisor
949.689.7270
nlamb@sageviewadvisory.com

Nick joined SageView Advisory Group with 15 years of financial services industry experience He is a full service financial advisor dedicated to working one on one with retirement plan participants and their families who have questions on asset allocation, retirement planning, insurance, investments and any personal finance questions.