



Weir Financial Resources...A Few Nice Words

"As a corporate manager I have often been in the position of needing information yesterday. And there is often a challenge to obtain that information from service providers on a timely basis, especially with rotating service reps. WFR's knowledge experience, and quite significantly, ability to 'stop in' with prompt information and service has been invaluable."

John Laubacker, CPA – CFO, CTG, Inc.

"It has been a pleasure working with Jon Weir and the entire WFR staff. Over the past 6 years I have grown into my role as CEO of Dryden Mutual Insurance and WFR has been ideal with my transition, by making it easier to understand the various products and ultimately leading me to make better decisions on behalf of Dryden Mutual. I have, and will continue, to recommend WFR to anyone seeking alternatives with their investment decisions."

Pete Vercillo, CPCU, CIC – President & CEO, Dryden Mutual Insurance Company

"Weir Financial Resources and Sterling Insurance Company established a close working relationship over 13 years ago and it continues to grow. WFR educated us on the finer nuances of corporate owned life insurance, and we have since established a sizable portfolio by purchasing such coverage on virtually all of our directors and officers. A significant amount of surplus will inure to the organization's benefit in future years as a result. In the interim, the return on our investments has outpaced that of our bond portfolio over the last 1, 3 and 5 years. Furthermore, WFR has illustrated to us how these instruments can be utilized from a benefits perspective. We are very pleased with all they have had to offer. They have out-paced our bonds over 10 years too, I just don't have that info at my disposal."

Stephen A. Harris, CPCU - Chairman, Sterling Insurance Company

"Some people give you only the advice you want to hear, WFR gives you the advice you need to hear. They assisted us in taking the action we needed to take. We have always benefited from their professionalism."

Jack Walsh III, JD, CIC – Chairman & CEO, Walsh Duffield Companies, Inc.

"It is always satisfying working with the professionals at WFR due to their unyielding devotion to client satisfaction"

Jim Smyton, Esq. - Partner, Phillips Lytle, LLP

"WFR has been of great assistance to our non-profit education foundation for inner-city children. Their knowledge and experience has been invaluable in helping our organization define its core mission, enabling us to continue assisting Buffalo's children long into the 21st century. We are very grateful."

Hon. Chris Jacobs, JD, MBA – Former US Congressman, President, Avalon Development & Director, Bison Scholarship Fund

"I would like to recommend that you take a phone call from either Bill or Jonathan Weir []. I have worked with both of them since 2004 on the [use of] corporate owned life insurance (COLI) as an investment tool for Dryden Mutual. The peripheral discussions about life insurance can get complicated and typically obscure the simple fact that COLI is a very useful way to manage (hedge) the downside of directly holding conventional investments in stocks and bonds for P&C insurance company."

Bob Baxter, CPCU, CIC – Retired CEO & General Manager, Dryden Mutual Insurance Company

"The advice WFR has provided is most enlightening. Their understanding and willingness to share the technical nuances of Executive Benefits has helped us to make the right decisions. Thank you for your professionalism."

Bob Brady – Retired Chairman & CEO, Moog Industries, Inc.

"For over twenty years, WFR has provided expert advice for investment options that best meet our needs for executive compensation plans. I have always found Jon and his staff to be very responsive and supportive with any requests we have made on the variety of products they offer. When questions do arise, they are always quick to respond with a precise answer that is easy to understand and communicate to the affected individuals. It's reassuring to know we can rely on their expertise that ultimately has allowed us to make the best decisions for our organization."

Steve Calzi – COO, Eastman Machine Company

"Over the years, WFR has provided our company with valuable advice and assistance in connection with the company's supplemental retirement benefit programs for executives. Their approach is always highly professional in manner."

John Murray, CPA – Retired VP of Finance & Treasurer, American Precision Industries, Inc.