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VITUCCI INTEGRATED PLANNING MERGING WITH BAY AREA RETIREMENT SOLUTIONS TO FORM LEADING REGIONAL FINANCIAL PLANNING FIRM

KENSINGTON & MARTINEZ, CA – (*8/15/2016)* – Vitucci Integrated Planning & Bay Area Retirement Solutions are pleased to announce a definitive merger agreement, combining their expertise to create a complete financial planning service that includes comprehensive financial advice, investment management, & tax considerations. The combined organization will operate under the Vitucci Integrated Planning brand, and oversee more than $150 million in client assets.

"I truly believe the merger with Jason and his staff is an absolute win for my practice and every client. Their vast experience coupled with Jason's approach of putting client needs and best interests first is a 100% fit with my philosophy and how I have built and run my practice for 30 years. In addition, I believe client service will only get better, as my clients will now have access to a deeper organization.," said Gene Schnabel, former Managing Director of Retirement Solutions, who will remain a financial advisor with the practice.

While the companies have operated under a joint venture agreement for the past three years, Jason Vitucci will now take on the lead role in ongoing financial planning for all client relationships going forward, and will serve as Managing Director for the combined firm. Mr. Schnabel will continue to serve in a consultative capacity, and maintain a continued presence in the firm's offices.

"The opportunity for us to join forces will be transformational for both practices. Philosophically, our approach of putting clients first was an exact fit with how Gene has built his business. It will be an honor to take up the mantle for Retirement Solutions clients to continue to serve them in a fiduciary capacity, as we aim to deepen our delivery of financial plans," said Mr. Vitucci.

"Our belief has always been that to provide integrated financial planning, we need to continually build a strong team approach. Similar to other strategic decisions we have made in the past, this merger means that EVERY client just got an upgrade in service," said Sonia Vitucci, Client Relations Manager. The firm plans to continue to maintain the current office locations in Kensington & Martinez, providing convenient access and serving the entire San Francisco Bay Area.

Vitucci Integrated Planning is an independent wealth advisory practice specializing in the integration of financial planning, investment strategies, and tax advice to clients throughout the San Francisco Bay Area. For more information, contact us at (510) 526-2220 or visit www.vitucciintegratedplanning.com. Jason Vitucci is a CERTIFIED FINANCIAL PLANNER™ professional offering securities through First Allied Securities, Inc., a registered broker-dealer, member FINRA/SIPC. Advisory services offered through First Allied Advisory Services, Inc., a Registered Investment Advisor. Tax Services not affiliated with or offered by First Allied.

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