



VITUCCI
INTEGRATED
PLANNING

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Media Contact: External Relations Manager
(510) 526-2220 ext. 108
info@vitucciinplanning.com

VITUCCI INTEGRATED PLANNING TO OPEN INTEGRATED PLANNING SUITES & CONSOLIDATE FINANCIAL PLANNING OPERATIONS

KENSINGTON & MARTINEZ, CA – (7/10/2017) – Vitucci Integrated Planning has announced it will open new offices featuring collaborative workspace & state of the art technology, building on their commitment to continually enhance the financial planning client experience. The new offices will include multiple conference areas, allowing client meetings to be more interactive & planning scenario analysis to happen in real time.

2890 N. Main St. is centrally located in the Contra Costa Centre business hub at the northern border of Walnut Creek, within walking distance of the Pleasant Hill BART station, and offers convenient access to Interstate 680. As part of the move, all day-to-day financial planning operations will relocate to the new offices. The Kensington office will remain as a by appointment only location outside of tax season. The Martinez location will close upon the move to the new site.

“Over the last 10 years, our team has built a process to deliver client financial plans at the highest level. Our new work space will be tailored to our process. Clients will enjoy more interactive meetings, which I believe will lead to a higher degree of confidence in their personal finances,” said Jason Vitucci, Managing Director for the practice. The Kensington office will also see an upgrade along the same focus, with a collaborative meeting space designed for client planning reviews with more interaction.

The firm is planning an Open House & Complimentary Client Shredding Event on September 23rd to provide clients a look at the new workspace prior to their next scheduled periodic review.

“Technology helps us create financial plans, but the gap can sometimes be in the delivery to our clients. Our new planning suites represent a significant commitment to continue to deliver on our fiduciary promise—leveraging an investment in technology, while continuing to offer the convenience of two East Bay locations. We believe clients will gain more financial clarity and confidence with the new experience.” said Sonia Vitucci, Client Relations Manager. The Integrated Planning Suites are scheduled to open early September in Walnut Creek & Kensington.

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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