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**VITUCCI INTEGRATED PLANNING ANNOUNCES EXPANSION OF INTEGRATED SERVICES, AFFILIATION WITH OSAIC WEALTH, INC.**

WALNUT CREEK, CA – (*7/10/2023)* – Vitucci Integrated Planning has announced an expansion of its Integrated Services and the affiliation of the practice with Osaic Wealth (formerly Advisor Group). Integrated Services incorporates tax preparation & planning, as well as a new service for guidance in preparing basic estate documents. With the expansion of these services, the practice intends to resume offering tax preparation services to new clients who also happen to engage in financial planning.

"Our goal has always been to build a planning hub for our client's finances—whether we help with in-house professionals or through our network of trusted partners. As your financial complexity grows, we want to be who you turn to for guidance in all financial issues," said Sonia Vitucci, who serves as Manager Director for Integrated Services at the practice.

"Preparing tax returns in-house has always been about client convenience. We also work closely with some clients long established tax advisors who they already trust, to expand tax planning," said Jason Vitucci, Managing Director for Client Strategy. 2023 tax year will mark a return to offering tax preparation for interested clients.

The addition of guiding clients through the estate planning process rounds out a holistic financial service offering for the practice. "By adding estate document guidance, we are addressing what I feel is often a neglected priority. These documents hold your intentions for finances & family guidance for your loved ones when you can no longer express these intentions. They are often a glaring missing piece for new clients joining our practice. This service will allow us to address this directly & succinctly, with immediacy," proclaimed Jason Vitucci.

Of the new affiliation, Sonia Vitucci commented, "The affiliation with Osaic allows us to leverage servicing systems & technology to keep our staff focused on supporting independent, unbiased planning & advice for our clients. We couldn't be more excited about the future for our clients & our team." Integrated Services expand September 1st. Osaic Wealth is one of the largest independent broker-dealers, with over 2000 employees supporting independent advisory practices across the United States.

**Vitucci Integrated Planning** is an independent wealth advisory practice specializing in the integration of financial planning, investment strategies, & tax advice to clients throughout the San Francisco Bay Area. For more information, contact us at (925) 370-3750 or visit www.vitucciintegratedplanning.com. Jason Vitucci is a CERTIFIED FINANCIAL PLANNER™ professional. Securities and investment advisory services offered through Osaic Wealth, Inc. member FINRA/SIPC. Jason Vitucci CA Insurance License #0F59894. Tax Services not affiliated with Osaic Wealth. Osaic Wealth is separately owned and other entities and/or marketing names, products or services referenced here are independent of Osaic Wealth.

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