Do You Have A Succession Plan For Your Business?

Smart Business Planning is Important to Both You & Your Clients

Far too many advisors don't have a clear plan in place. Transitioning your business to Vitucci Integrated Planning allows you to prepare for your clients' futures as well as your own. Whether you are looking to retire in two years or grow your business for another 15 years, a good succession plan starts with a good partnership. We invite you to explore our practice as your potential partner.

Offer your clients more...tax planning...systematic client service... complete wealth management.

VITUCCI INTEGRATED PLANNING

WEALTH MANAGEMENT • TAX PLANNING • INVESTMENT STRATEGIES

Experience in Succession

Vitucci Integrated Planning was founded in 2008, after both principals had worked at previous financial planning firms (where they both had experience with several mergers). The practice has been built through a combination of organic growth and M&A activity.

We acquired a tax preparation practice at the outset of our founding and built out the expertise of the tax staff. Later, we merged our practice with another sizable financial planning firm—with an advisor who had affiliated several years prior to protect his business. We have since merged-in another small advisory practice for a seller who wanted to exit the business quickly.

Many Paths to Protection

- **Affiliate** -- If you are not ready to retire, but want to protect the equity you have built, why not affiliate with our practice? You can tap into our in-house expertise, and build a continuity relationship giving your clients (and your family) peace of mind. You can begin your succession plan when you are ready.

- **Merge** -- Begin to implement a succession plan that allows you to exit your business elegantly--where you & your clients are comfortable with the process. Your succession can be designed over a comfortable timeframe.

- **Sell** -- Certain business owners may feel the need to move on quicker. Let us help you exit expediantly by helping your clients feel comfortable with a skilled team of down-to-earth financial professionals.

About...

VITUCCI INTEGRATED PLANNING

Led by husband & wife team Jason & Sonia Vitucci, the couple have executed on a vision to create a full service practice. They integrate advice across the overlapping puzzle of personal finance to help put clients in a position to make confident financial decisions. The practice has assembled a team of professionals with extensive experience with skills ranging from tax preparation to investment management.

Our continued commitment is to work closely with clients to help them navigate life's challenges. Our practice has developed a specialty in helping pre-retirees, business owners, & busy executives structure their net worth to minimize taxes, volatility, & risk.

Our Paradigm for Integrated Planning

1 - Financial Planning

A foundational understanding of your net worth, asset base, & cash-flow

- Establishing Current Financial Condition
- Advising Across a Set of Comprehensive Wealth Issues

2 - Net Worth Structure

Advanced diversification linking planning needs & risk tolerance

- Asset Allocation & Asset Location
- Converting Retirement Savings to Lasting Income

3 - Tax Planning

Beyond just tax preparation--it's not only about the size of your nest egg, it's about how you crack it open

- Tax-Aware Investing & Savings Plans
- Planning for access to tax-deferred retirement accounts

4 - Estate Considerations

Avoid probate, create a legacy--impact is about more than just money

- Efficient transfer of wealth to family or charity at your passing
- Minimizing Income or estate taxes for heirs

**Tax services are not endorsed by nor affiliated with Osaic Wealth.*

Our Practice By the Numbers

- **2 Principals**
- **2 Associate Planners**
- **3 Tax Professionals**
- **4 Licensed Financial Professionals**
- **3+ Advisor Affiliations/Mergers over last 10 Years**
- **Highly Experienced Support Staff**

Our broker-dealer/RIA partners in Osaic Wealth (formerly Advisor Group) provide us with ample resources to deliver efficient financial planning and an approved solution set with ample breadth of investment selection.

Access to:

- Technology
- Transition Support
- Compliance
- Model Portfolios

Want to Explore Working with Vitucci Integrated Planning?

Contact Sonia Vitucci to Schedule your Office Visit & Succession Discussion

2890 N. Main Street, Suite 201
Walnut Creek, CA 94597
Phone: (925) 370-3750 Ext. 108
info@vitucciplanning.com

www.vitucciintegratedplanning.com

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