

TAKE A CLOSER LOOK @ WEALTH MANAGEMENT

When was the last time you had an Independent evaluation of your ENTIRE financial picture?

jVitucci Financial Services, Inc.

Wealth Management ♦ Tax Planning ♦ Investment Strategies

A Defined Roadmap addressing 8 CRITICAL WEALTH ISSUES

FISCAL FITNESS & ORGANIZATION

- ◆ Current Financial Condition—
Balance Sheet & Cash-Flow
- ◆ Financial Goal Planning &
College Funding
- ◆ Leveraging Liabilities—
Mortgage & Home Equity

RETIREMENT PLANNING & FEASIBILITY

- ◆ Capital Needs &
Financial Independence
- ◆ Transition Management &
Income Distribution Planning
- ◆ Qualified Retirement Plan Coordination

EXECUTIVE COMPENSATION

- ◆ Stock Options
- ◆ Employee Benefit Choices

ESTATE & LEGACY PLANNING

- ◆ Documents—Wills & Trusts;
Durable POA for Finance & Healthcare
- ◆ Proper Titling of Assets
- ◆ Executor/Trustee Naming
- ◆ Distribution of Wealth at Death
- ◆ Charitable Inclinations



INVESTMENT STRATEGIES

- ◆ Institutional-Quality
Professional Management
- ◆ Asset Location & Asset Allocation
- ◆ Transparency & Holdings Overlap

TAX EFFICIENCY

- ◆ Tax Preparation Review
- ◆ Changing Nature of Income Taxation
- ◆ Year-end Tax Planning
- ◆ Tax-Advantaged Investing

INSURANCE & RISK MANAGEMENT

- ◆ Life Insurance Efficiency
- ◆ Long Term Care Risk Assessment
- ◆ Disability Coverage Analysis
- ◆ Property & Casualty Benchmarking

BUSINESS & SUCCESSION ISSUES

- ◆ Business Strategy Planning
- ◆ Succession Planning & Funding



(510) 526-2220
www.jvituccifinancial.com
info@jvituccifinancial.com
303 Arlington Ave, Suite B3
Kensington, CA 94707

ABOUT OUR PRACTICE



Founded by husband and wife team Jason and Sonia Vitucci, J. Vitucci Financial Services is a boutique wealth management practice specializing in fee-based investment management, sound tax advice, and developing individualized strategies.

Recognizing an industry disconnect between tax planning & investing, the couple has executed on a vision to build a wealth management practice integrating active asset management, expert tax advice, and unbiased financial planning—AND assembling a team of in-house specialists.

Our goal is to work closely with clients to help them navigate life's challenges. Our practice has developed a specialty in helping pre-retirees & early retirees navigate the transition to retirement. We also work with business owners & busy executives in managing their total financial picture.



INDEPENDENCE

Rather than representing a specific insurance company, bank, or Wall Street wirehouse, our independence gives us a Main Street perspective as business owners—providing us the autonomy to offer clients the best, without being constrained by cookie-cutter plans or corporate agendas.

INTEGRATION

Because of the nature of financial services, people tend to have disconnected plans for tax, investments, and financial & estate planning. Our in-house team addresses and evaluates your current financial condition to take full advantage of the overlapping areas of personal finance; addressing potential pitfalls and opportunities on a proactive basis.

FEE-BASED

Our fee-based approach puts us on the same side of the table as our clients—and in the role of fiduciary. Working with a fee-based advisor keeps you less reliant on product salespeople, generic financial tips, or the word on the street, and ensures that your investment strategies are in line with your personal financial planning goals.

about

Jason Vitucci, CFP®, EA

Jason Vitucci has been helping people in the area of personal finance for more than a decade. As a financial advisor, Jason has worked with industry leading advisors, developing a proprietary process to deliver customized, tax-advantaged wealth strategies. He has a comprehensive consultative approach to client-centered planning.

EXPERIENCE

As the former Director of Operations for a financial advisory firm with over \$300 million under management, Jason spear-headed the development of the firm's financial planning process. Additionally, Jason cultivated his own group of clients and forged strong relationships with them as their trusted financial advisor. He has written and produced content for various media and been a guest on many radio programs over the last 10 years. Jason currently curates his own blog on personal finance and economic issues.



Advanced Financial Designations:

- **CERTIFIED FINANCIAL PLANNER™**
Certified Financial Planner Board of Standards
- **CERTIFIED WEALTH STRATEGIST®**
Canon Financial Institute
- **ENROLLED AGENT**
Enrolled to practice before the IRS

Education:

- **MASTER OF SCIENCE -- INTERNATIONAL BUSINESS**
University of London
- **POST GRADUATE DIPLOMA -- FINANCIAL PLANNING**
University of California, Berkeley
- **BACHELOR OF ARTS -- HUMANITIES**
Saint Mary's College of California

Jason Vitucci is a **CERTIFIED FINANCIAL PLANNER™** professional offering Securities & Advisory Services through First Allied Securities, Inc., a registered broker-dealer, Member FINRA, SIPC, & a Registered Investment Advisor. CA Insurance Lic.: 0F59894