



William J. Urbanik, MBA

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[Intro Video Link](#)



“Financial Planning is more than just good advice or investment returns. It’s about providing guidance that can be trusted, valued and embraced as an empowering force working to transform goals and objectives into results and achievements. Our initial goal with every new relationship is to establish an image for clients where they affectionately view our role in their lives as the coaches at their side, not salespeople in their ear.”

William (Bill) is known by friends to be exceptionally outgoing and has a great sense of humor. He is one of the Co-Owners of our firm and serves as a Wealth Planner on our Wealth Management Team. He has been in the financial services industry since 2002 and has worked diligently to establish a business that others value. In 2014, he was featured in the January '14 issue of Rep Magazine being listed as one of the Top 40 Financial Advisors under the age of 40 and made the Top Next Gen IBD Advisors list ranked exclusively by assets under management by WealthManagement.com. Well respected by his colleagues for his business acumen and ingenuity, and after being highlighted by his broker dealer SagePoint Financial at their 2015 National Education Conference in San Antonio, he was honored to be selected as a member of the SagePoint Financial President's MAC (Management Advisory Council)---a group of advisors from across the country selected by the President of SagePoint to advise the broker dealer on policies, objectives and strategic planning. At the time of his appointment he was just 39 years old making him the youngest to ever be selected to serve on this board. In 2019, Bill and the other partners decided to move their practice and operation away from SagePoint Financial to LPL Financial after discovering the tremendous value LPL could add to the experience they offer clients with advanced technology and wealth management platforms.

He is originally from Washington, PA where he has fond memories growing up with his father Bill who was a City of Washington police officer, mother Janice who worked for Brockway Glass and younger sister Georgia. He is a 1995 graduate of Washington High School where he was a four year multi-sport letterman in soccer, ice hockey and tennis and while also enjoying hobbies of trap shooting and skiing. During his youth he traveled the country with his family competing in soccer tournaments and developed into a player that achieved several honors and distinctions as well as still holding several school scoring records.

He is an alumnus of California University of Pennsylvania where he earned a Bachelor of Science in Education (BSE) degree and attained a Commonwealth of Pennsylvania Teaching Certification. Graduating as a Presidential Scholar Cum Laude, he also won the Student Association's Distinguished Service Award. He played varsity soccer and briefly played for the CalU ice hockey club team. He was involved in multiple university clubs, organizations and committees. He was a Student Government Senator, a Representative on the Student Association's Cabinet, a student representative on the university's Judicial Board, President of the Interfraternity Council (IFC) and held numerous leadership positions within the Beta Sigma Chapter of the Theta Xi Fraternity including being one of only three members ever elected to serve two terms as President in the chapter's existence since 1965.

In 2005, he earned a Master of Business Administration (MBA) degree specializing in Management from Seton Hill University, graduating Summa Cum Laude and in 2006 completed the Leadership Academy through the School of Leadership and Professional Advancement at Duquesne University.

He continues to be actively involved in sports and is an avid sports fan being a season ticket holder for the Penguins and Steelers. He is a nationally credentialed soccer coach having earned the distinguished National and Advanced National Diplomas through the National Soccer Coaches Association of America (NSCAA) as well as other licenses. He was

the head junior varsity coach and assistant varsity head coach for boys soccer at Greater Latrobe High School from 2004-2006 before being named Head Coach for varsity soccer at Hempfield Area High School where he coached from 2006-2011 leaving behind the highest winning percentage of any head coach in school history as well as leading the team to its first playoff victory in the programs 40+ years of existence in 2007. He served as an instructor for the California University of PA High School Camps from 2007-2011. In 2007, he was honored to be selected to serve as an instructor for Soccer Plus Camps which was established by Tony DiCicco who famously won Olympic Gold and World Cup championships with the US Soccer Women's National Team. He has also attained his Level 3 Certification through USA Hockey and currently serves as both a Coach and Board Member for the Westmoreland Hockey Association.

Always the competitor and sportsman, Bill continues to play soccer and ice hockey when he can and enjoys golf, skiing and occasionally gets to do sporting clays. Never afraid to challenge himself, he trained for and completed two Tough Mudder (<https://toughmudder.com>) competitions in 2015 and 2016 that were 12 miles in length as well as posing 26 obstacles citing the most physically challenging crawling through a gas chamber and most mentally challenging being those that used electrocution. In 2017, he surprised his family and friends by accepting an invitation to participate in the local Dancing with the Celebrities competition to benefit Animal Friends of Westmoreland County. Overcoming a discomfort with dancing, he performed the Cha-Cha (<https://www.youtube.com/watch?v=XvIqGBnKikk>) in front of 80 friends and family there to support him and over 700 total attendees at the Palace Theatre in Greensburg with partner Deb Altoff to Michael Jackson's hit song Smooth Criminal scoring all 10's by the judges and leaving that night with a two trophies for fan vote and judges vote.

He thoroughly enjoys US and presidential history and keeping up with current events and studying policy. Bill considers one of his greatest professional accomplishments the early success and popularity of GOAL Magazine which is produced by Go2Goal (www.go2goalus.com), a non-profit he co-founded in 2016 and that is named in relation to his personal mantra---GO2GOAL. His undying effort to the advancement of this project has further cemented a reputation for being committed to endeavors that involve his community and education, philanthropy and advances the spirit of entrepreneurship, while being willing to work collaboratively with other business owners and community leaders to deliver value to local residents.

His work within our community is well recognized and he supports numerous causes especially those benefiting kids with special needs. He and his wife have provided scholarships to college students working towards careers to assist children with special needs and his involvement with GOAL Magazine and other organizations further solidifies that reputation of someone who makes a difference. In 2017, he was one of five men asked to be in the popular Fashion Show hosted by the Westmoreland Cultural Trust at the Palace Theatre. He is always quick to volunteer to serve as a guest instructor at local universities or speak to students of any age about any topic. He was formerly a director on the Board of Directors for the Westmoreland Workforce Investment Board (<http://westfaywib.org>), California University Alumni Association and California University's Foundation Board. Currently, he is a member of the Loyalhanna Masonic

Lodge #275 located in Latrobe, the Financial Services Institute (FSI), NSCAA and USA Hockey Association.

Although a hard worker committed to many causes, there is no role he values and cherishes more than being a father adhering to his “Father First” motto. He resides in Latrobe with his wife Jessica (Laick) Urbanik from Mount Pleasant, PA who he married in 2003 and identical twin sons, Aidan and Jacob born in 2006 and they are members of the St. Vincent Basilica Catholic Parish. He enjoys skiing with his family as well as spending time at Indian Lake golfing with his sons, boating and getting better at his most recent hobbies wakeboarding and wakesurfing---thoroughly enjoying that time with his family and closest friends.

He continues to coach his sons’ sports teams while cherishing every opportunity to coach them individually in whatever activity they are engaged. His wife and kids all share his love of travel, history and adventure and they have traveled extensively together exploring a variety of cultures and experiencing the world one trip at a time.

He credits his success to those closest to him. In addition to working with an amazing group of people and having tremendously supportive friends, he looks to his parents, in-laws, kids and wife for shaping him the most. He credits his father, who passed away at the age of 59 in 2011, for a lot of his success because he taught him so much about being independent and helped him discover attributes that others would value. His dad always told him “if you can breathe you can play” and “you are only as good as those you surround yourself with”. His mother impressed upon him from a young age that his role as a father would be his most important job and that no other title meant anything if you couldn’t succeed at that. He credits his in-laws Matthew (deceased in 2009) and Gladys Laick for inspiring him to join the financial services industry and mentoring him in his beginning years. He gets emotional when discussing how supportive his wife has been and how she carried them in the early years of their relationship and marriage as he was struggling to get a business started admitting that he “had nothing to really offer her”.

When asked what motivates him the most personally he credits his sons, Aidan and Jacob, who have inspired him by what they have done to overcome challenges and how much they have taught him. Both of his sons are avid skiers and excellent at water sports like wakeboarding and surfing. Aidan also enjoys golf, running cross country and video gaming and has his father’s entrepreneurial spirit always running new business ideas by his dad. Jacob is an avid ice hockey player with a relentless work ethic and passion for the game.

When asked professionally what motivates him he smiles and recalls a high school guidance counselor telling him he would never go to college or make anything of himself. He recalls coaches who told him he was too small to play soccer in college. The resolve and determination to prove doubters and naysayers wrong has driven him mightily and still does. Just tell him he can’t do something and sit back and watch him go do it.

He respects and adores everyone he works with at the office and considers them all friends as well. He knew almost every single team member personally prior to working together and cares very much about their roles being rewarding and assuring they are valued with the opportunity to grow themselves. He always says that one can never be successful unless they are facilitating the success of others. Lastly, he acknowledges the

overwhelming honor and sense of purpose he gets working with so many loyal clients who have entrusted him to stand with them as their coach with regards to their financial future.

No matter whether he is on the sideline, on the field, at a hockey rink, at home or the office, Bill is a coach and player at heart. He is a visionary who is exceptionally competitive, leads by personal strength and by example, has an undying work ethic, is poised under pressure and coaches people through emotional times and savors. He exudes confidence which inspires others and is a great motivator within our team constantly finding ways to bring energy to each day and vision for the next.

Driven by his “GO2GOAL” mantra, his teammates at the firm affectionately call him “The Comet” because he never yields to anything in his pursuit of whatever he has his mind set to and always acknowledges excitement with any progress anyone makes with a simple, “Boom!” He is truly, in every sense, relentless and undeterred to make a difference in people’s lives.