J Vitucci Financial Services, Inc.
Wealth Management • Tax Planning • Investment Strategies

Retirement Solutions
Gene A. Schnabel

FOR IMMEDIATE RELEASE
8/26/2013

Media Contact: **Sonia Vitucci**
External Relations Manager
(510) 526-2220 ext. 108
sonia@jvituccifinancial.com

GENE A. SCHNABEL RETIREMENT SOLUTIONS & J. VITUCCI FINANCIAL SERVICES ANNOUNCE JOINT VENTURE

MARTINEZ & KENSINGTON, CA – (*8/26/203*) – Gene A. Schnabel Retirement Solutions & J. Vitucci Financial Services announced today a joint venture to combine certain resources & services in an effort to provide greater financial planning depth to clientele. These resources include: Interactive Financial Planning, Client Educational Workshop Series, Integrated Tax Planning, & Geographic Location Breadth.

Retirement Solutions clients will gain access to the interactive financial planning platform (or iPlan) used by the J. Vitucci Financial Services team. This helps clients to continually track their net worth, get fiscally fit, & stay organized. “Our iPlan financial planning process is especially helpful as a client budgeting tool, and to help clients stay actively engaged in the planning process. We focus on the goal of the process as putting the client in the best possible situation to make confident financial decisions,” said Jason Vitucci, Managing Director of J. Vitucci Financial Services.

“One of the promises that I made, when I entered into contract with our credit union partners that we work with is to educate their membership. We have fulfilled this to a point, but our joint venture will allow us to offer a variety of financial workshops through the series that Jason and his staff put on,” said Mr. Schnabel, owner & advisor at Retirement Solutions. The staff currently provides 6-8 financial workshops per year, focusing on a “deep-dive” into one aspect of financial planning.

J. Vitucci Financial’s tax team will also serve as a resource for Retirement Solutions’ clients. This kind of integration could prove invaluable as the tax code changes. “Taxes could become a large part of retirement expense planning if rates rise to cover government deficits & budget shortfalls. We have staff that can help plan and address this on a proactive basis; even liaising with your current tax advisor in close collaboration for your benefit,” said Mr. Vitucci.

Retirement Solutions clients can now also meet in a West Contra Costa County location in the town of Kensington, for added convenience. Mr. Schnabel added, “There is some real excitement at our practice to be working with Jason and his staff, and I think our clients will enjoy his energy and perspective.”

J. Vitucci Financial Services is an independent wealth management practice providing financial planning, investment strategies, and tax advice to clients throughout the San Francisco Bay Area. **Retirement Solutions** has been helping clients in Contra Costa County for nearly 30 years, & has exclusive contracts with several local major financial institutions. Jason Vitucci is a CERTIFIED FINANCIAL PLANNER™ professional & Gene Schnabel is a financial advisor, both offering securities through First Allied Securities, a registered broker-dealer, member FINRA/SIPC. Advisory services offered through First Allied Advisory Services, Inc., a Registered Investment Adviser.

###