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**J. Vitucci Financial Services, Inc. Merges with Local Tax Planning Office
to form Holistic approach to Financial Services.**

KENSINGTON, CA, 2/1/2009--Family-owned J. Vitucci Financial Services, Inc. has recently merged their investment management practice with Lillian Lea's tax preparation firm here in Kensington. Lea Tax Planning & Preparation has been serving clients in the east bay for nearly 30 years.

Husband and wife owners Jason and Sonia Vitucci are excited about the synergy that this merger creates. "The unique opportunity presented itself to merge with a very well-respected tax firm and we could not resist, as this practice matched our core values. Having tax, investments, and planning all under one roof is a real value-add for clients. Quite often, you meet with clients to find that the 'left hand' of tax advice doesn't know what the 'right hand' of investment management is doing," said Jason. "The ability to combine financial plan formulation with implementation on the tax and investment side is a real win for us as advisors, but also a win for the client."

Additionally, Lea claims that she was always hesitant about referring clients to outside advisors. Not so, with her in-house partners: "I could tell from our first initial meeting in the way that they talked about their clients that this would be a great working relationship. They really care about their clients, so it was a real fit culturally in that we are all client-centered and service oriented." Leveraging the various unique capabilities of the staff is another value-add. "If I need clarification on a part of the tax code with regard to a client's investment account, I can simply walk across the office to consult with one of the preparers," said Jason. This type of resource base is not normally common with local boutique firms such as the Vituccis'.

The firm is reaching out to local clients for 2009, offering tax services for 2008 income tax returns, as well as fee-based active investment management. They can also implement a full financial plan, which aggregates and changes daily based on your ever-changing financial situation. "We have found that this type of analysis is becoming increasingly important given the current economic crisis," said Jason. The firm offers a full financial overview at no cost and with no obligation. J.

Vitucci Financial Services, Inc. is located at 303 Arlington Avenue, Suite B3, and can be reached at (510) 526-2220.

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