

Pinnacle Wealth Planning Services, Inc.

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Pinnacle Wealth Planning Services, Inc. (“Pinnacle”) is an Ohio corporation founded by William D. Heichel in 1998 as a successor financial planning company to Lifetime Planning, Inc., which he founded in 1980. Pinnacle’s mission is to work in conjunction with high net worth clients’ CPAs and Attorneys to provide fee-only comprehensive financial planning and investment advisory services with the highest degree of professionalism and integrity, resulting in significant positive changes in the personal and financial life of each client.

Pinnacle is one of Ohio’s oldest and largest fee-only (no commissions paid and no products sold) wealth management firms working exclusively with high net worth clients (investment assets of \$500,000 to \$25 million) and business owners of CPAs and attorneys.

A leader in the financial planning industry, Pinnacle was featured as one of six Forbes Magazine’s Cleveland Financial Profile Firms (*Forbes*, 2008), recognized for nine consecutive years as one of the *Top Wealth Management Firms in the U.S.* (*Wealth Manager* magazine, 2002 – 2011), and as one of the Top Registered Investment Advisor Firms in the U.S. (*Financial Advisor* magazine, 2005-2011)



Pinnacle’s president, William D. Heichel, has received national recognition during his career as an attorney and a Certified Financial Planner™:

He has been recognized for five consecutive years by as one of the *Top Wealth Advisors in the United States* (*Worth* magazine, 2004 – 2008).

He was honored as one of the selected to *150 Best Financial Advisers to Doctors* (*Medical Economics*, 2006, 2008 and 2010).

He authored a book for the financial planning industry entitled “The Annual Financial Planning Scorecard – The Ultimate Financial Planning Tool for CFP®s to Capture and Retain High Net Worth Clients and Build a Strong Referral Network of CPAs and Attorneys”.

He has been recognized by his peers in the legal profession as an AV rated attorney, which is the highest rating an attorney can receive. The A rating represents the highest rating an attorney can receive for the quality of his legal work and the V rating represents the highest rating an attorney can receive for his ethical standards. (Source: Martindale Hubbell.com)

