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Investment Management

Our proprietary investment method combines portfolio diversification with active management, so you have the money you need for the lifestyle you want.



Watch Michael Kitces' eye-opening new webinar, **How To Manage Sequence of Return Risk in Retirement**. It might just change your outlook on investing for retirement!

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Retirement planning, 401K rollovers, tax mitigation strategies, estate planning, small business planning, insurance analysis, education planning... our experts can advise on it all.

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Wealth Management

We'll manage your investments, maintain your financial plan, and watch over every aspect of your financial life, so you can spend time doing what you love instead of worrying about your money.

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Work with the sharpest mind in wealth management.

With Michael Kitces as both a partner and Director of Financial Planning Research, Pinnacle clients benefit from his cutting edge work long before the rest of the industry. Our individual Wealth Managers use his research to guide their own planning, and consult with him directly when a client is facing an unusual financial problem.



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"A major force in the planning profession... Kitces has been at the forefront of the evolution of financial planning."

Investment News

"Michael Kitces has become the profession's most reliable commentator on complex financial planning issues."

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"In Michael Kitces... the industry has its intellectual. Kitces thinks deeper than most people about a wide range of topics in this field."

Financial Planning Magazine



An award-winning, nationally-ranked firm

We've received a host of industry and consumer awards. Pinnacle is on the cutting edge of private wealth management, and we're grateful that others in the profession have recognized our hard work.



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Pinnacle Advisory Group is a private wealth management firm, founded in 1993 and headquartered in Columbia, Maryland, with offices in Miami and Naples, Florida. We work with more than 1230 families and manage approximately \$2 billion in assets for clients both in the mid-Atlantic region, and around the world.

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