



DiNuzzo Index Advisors, Inc.
FIDUCIARY WEALTH ADVISORS SINCE 1989

(/)

**Financial Life Management
with "The DiNuzzo Financial
Wellness LifePlan™"
...Trusted Since 1989**

Phone: 877.728.6564 (tel:877.728.6564) Email: info@dinuzzo.com (mailto:info@dinuzzo.com)

Client Portal (<https://dinuzzoindex.portal.tamaracinc.com>) Custodian Logins (</view-my-account>)

What...

We Empower Smart Money & Best Life Choices

DiNuzzo Index Advisors, Inc., At A Glance

As of June 30, 2019

30th

Year in Business in
Southwestern Pennsylvania



\$724M

Assets Under Management



CFP's - 4

PFS - 1

CPA's - 1

ChFC's - 4

AAMS - 1

AIF's - 7

MBA's - 4

MSTx - 1

MSFP - 1

Credentials & Designations

162

Years of Combined Wealth Advisor Experience

33

States are Home to
DIA Clients



PITTSBURGH BUSINESS TIMES



(<http://www.bizjournals.com/pittsburgh/subscriber->

2018 BEST PLACES TO WORK

[only/2016/10/29/best-places-to-work.html](http://www.bizjournals.com/pittsburgh/subscriber-only/2016/10/29/best-places-to-work.html))



DiNuzzo Index Advisor, Inc.
FA RIA Ranking 2018

([/sites/default/files/users/pjdinuzzo2/pdf/0918_DiNuzzo_web.pdf](http://sites/default/files/users/pjdinuzzo2/pdf/0918_DiNuzzo_web.pdf))



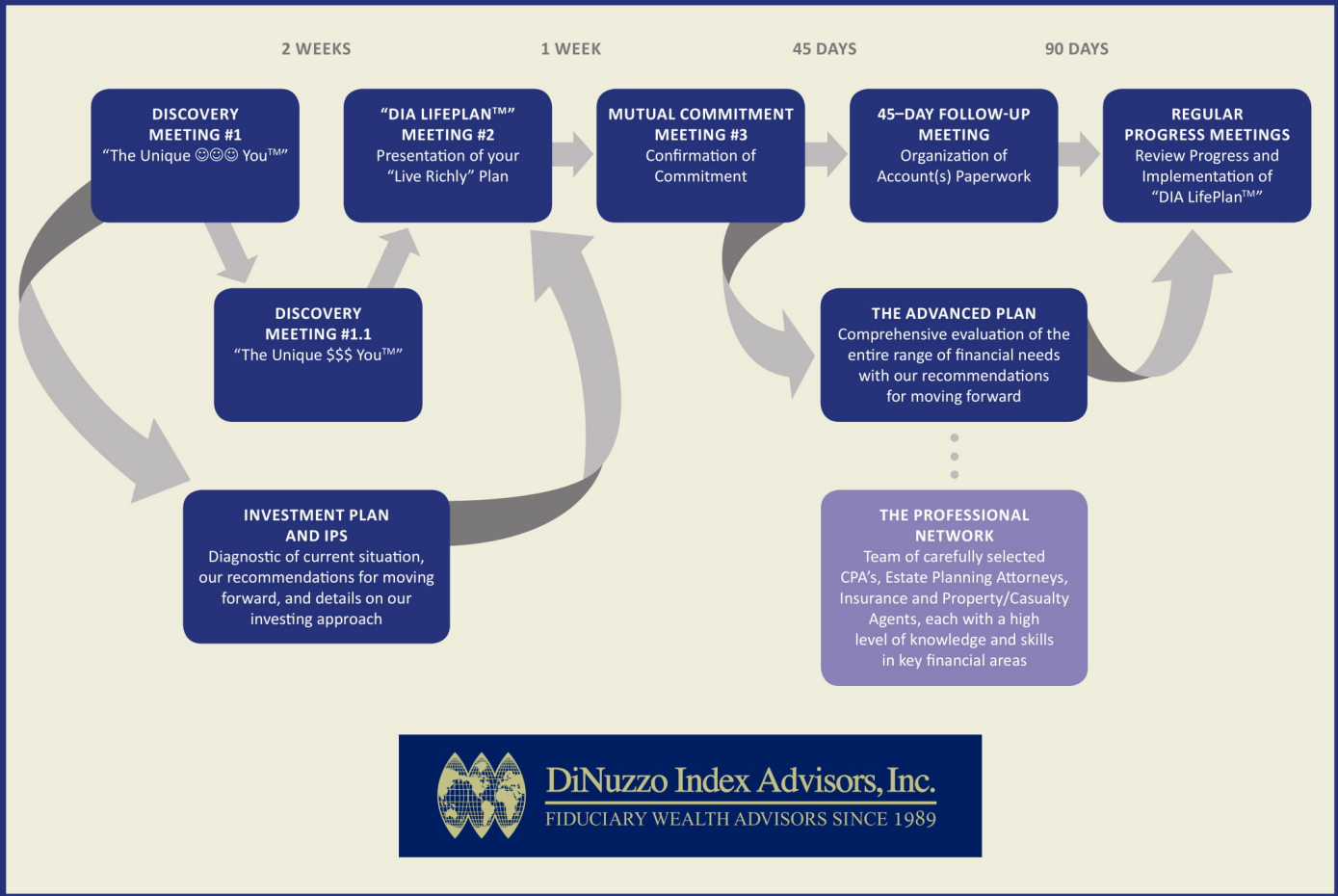
[CLICK HERE FOR MORE INFORMATION \(/SITES/DEFAULT/FILES/USERS/PJDINUZZO2/PDF/2018%20DISCLOSURE\)](#)

[CLICK HERE FOR MORE INFORMATION \(/IMPORTANT-DISCLOSURE-INFORMATION\)](#)

[CLICK HERE FOR MORE INFORMATION \(/2017-FIVE-STAR-DISCLOSURE\)](#)

“The DiNuzzo Financial Wellness LifePlan™”

“Empowering Smart Money & Life Choices™”



Meet Our Team

We Have Aspired Since 1989, Under Our Fiduciary Standard, to be Our Family of Client's Most Trusted
Advisor
and Guide Them to "Live Richly" Through "The DiNuzzo Financial Wellness LifePlan™".

"Front Stage"



P.J. DiNuzzo
President, Chief Investment Officer, Founder

BIO (/P-J-DINUZZO)



Mark S. DiNuzzo
Wealth Advisor, Client Services Director

BIO (/MARK-S-DINUZZO)



Carl J. Hartman
Wealth Advisor, Senior Investment Officer

BIO (/CARL-J-HARTMAN)



Michael V. DiNuzzo
Wealth Advisor, Wealth Planning Manager

BIO (/MICHAEL-V-DINUZZO)



Robert F. Graham
Wealth Advisor, Retirement Planning Manager

[BIO \(/ROBERT-F-GRAHAM\)](#)



Jacob R. Potts
Wealth Advisor, Portfolio Team Manager

BIO (/JACOB-POTTS)



Leslie D. Taylor-Neumann

Wealth Advisor, Wealth Planning Team Leader

BIO (/LESLIE-D-WOLFORD)



Mark W. Ambrose
Wealth Advisor, Wealth Planning Manager

BIO (/MARK-W-AMBROSE)



Jennifer Reddinger Wolfe
Wealth Advisor, Wealth Planning Manager

BIO (/TEAM-MEMBER/JENNIFER-WOLFE-REDDINGER)



Andrew C. Pursel

Wealth Advisor, Wealth Planning Manager

[BIO \(/ANDREW-C-PURSEL\)](#)

"Back Stage"



Jackie DiNuzzo
Compliance Officer, Human Resource Manager

BIO (/TEAM-MEMBER/JACKIE-DINUZZO)



Lisa Faulkner
Senior Client Service Specialist

BIO (/NODE/211925)



Phyllis Nutz
Administrative Assistant

BIO (/TEAM-MEMBER/PHYLLIS-NUTZ)



Terri Tepsic
Executive, Finance, Marketing Manager

BIO (/TEAM-MEMBER/TERRI-TEPSIC)



Cliff Smith
Director of IT

BIO (/TEAM-MEMBER/CLIFF-SMITH)



Brooke McMaster
Client Service Specialist

BIO (/NODE/211927)



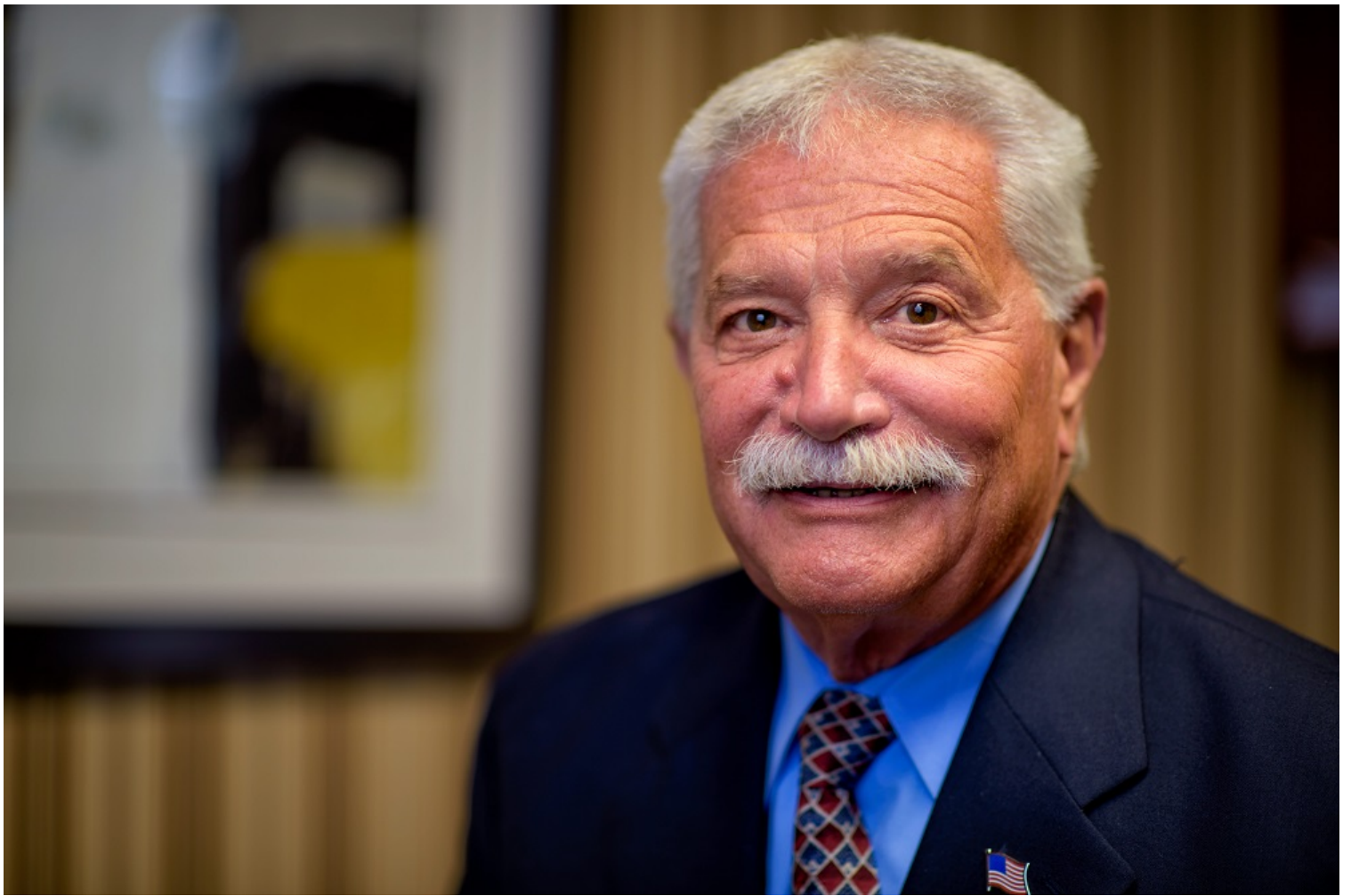
Rose M. Dessler
Compliance Officer, Human Resource Manager

[BIO \(/NODE/254601\)](#)



Keri Ronacher
Portfolio Reporting Manager

BIO (/TEAM-MEMBER/KERI-M-RONACHER)



Ken Aikens
Client Service Specialist

BIO (/TEAM-MEMBER/KEN-AIKENS)



Renee Foody
Administrative Assistant

BIO (/TEAM-MEMBER/RENEE-FOODY)



Marjorie Patterson
Client Service Specialist

BIO (/TEAM-MEMBER/MARJORIE-PATTERSON)



Denise Lyons
Bookkeeping Manager

BIO (/TEAM-MEMBER/DENISE-LYONS)



Nick DiNuzzo
Marketing Manager

[BIO \(/NODE/211928\)](#)

- [Sitemap \(/sitemap\)](#)
- [Legal, privacy, copyright and trademark information \(/legal-privacy-copyright-and-trademark-information\)](#)
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DISCLOSURE (/IMPORTANT-DISCLOSURE-INFORMATION)

ACCREDITATION DISCLOSURE (/ACCREDITATION-DISCLOSURE)

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