



"IF YOU WANT TO GO
FAST, GO ALONE. IF
YOU WANT TO GO
FAR, GO TOGETHER."
- AFRICAN PROVERB

Play the Video (<https://www.youtube.com/watch?v=cN9Ph-3XmKQ>)

(http://

HOW WE HELP FOLKS JUST LIKE YOU



LINDA AND CARL
BERNSTEIN

PROUD GRANDPARENTS WHO
TRAVEL

Carl and Linda have seven grandchildren in three states. They want to make sure their future is



DEBRA BIANCHI

BUSINESS OWNER AND
PHILANTHROPIST

For Debra, making money isn't as important as making a difference. She volunteers at the local food

(/stories/family-matters) (/stories/giving-changes-lives) (/stories/the-next-chapter)



LISA AND BRENT DILLARD

IN TRANSITION

Brent and Lisa own a successful

filled with time spent with their family, not focused on day-to-day financial management.

FAMILY MATTERS

pantry, and wants her legacy to provide hope for the homeless.

HER GIVING CHANGES LIVES

family business. While Brent had no plans to retire, unexpected events are driving the need to quickly transition leadership within the business.

WHAT'S THEIR NEXT CHAPTER?

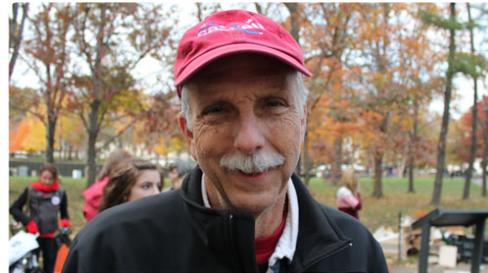


KEN MIKITANI

PRESIDENT AND WEEKEND BOATER

Monday through Friday, Ken leads his company of 150 employees to financial success. On the weekends, he hits the lake. Ken doesn't want to have to worry about his finances while fishing.

KEN DEMANDS TIMELY EXPERTISE



JOHN FULTON

WAR VETERAN AND RETIRED BUSINESS OWNER

A decorated Vietnam War veteran and retired oil company executive, John suddenly finds himself facing the battle of his life.

WHAT IS JOHN'S LEGACY?

(/stories/timely-expertise) (/stories/legacy)



JASON KOZLOWSKI

LOGISTICS EXPERT AND HIKING BUDDY

Jason knows how to network, connecting raw materials in Nova Scotia with factories in the Shenzhen Province. But what really gets him excited is how his finances allow him to travel.

LIFE ON JASON'S TERMS

(/stories/life-on-jasons-terms)

While seemingly very different, our accomplished professionals, executives, business owners, and entrepreneurs are all strongly independent people with a passion for freedom, family, and the ability to choose how to best live their lives on their terms.

They demand competent, pro-active, objective, and actionable advice that leads to simplicity and clarity in their financial and investment management. They have access to tools such as robo-advisors, do-it-yourself, and other online cookie cutter solutions, however they seek creative problem solving and unrestricted access to ideas crafted around their needs that seek to protect what they worked hard to accumulate and help grow their worth to enhance their life's ambitions. They desire a team that genuinely knows them!

LEGACIES AND LIFE STORIES MATTER

Play the Video

FAMILY IS EVERYTHING

Managing family wealth requires a team with a diverse range of talent and the expertise to effectively coordinate all aspects of your financial picture.

(http://

Dedicated Financial Steward (/family-office)

OUR WIN/WIN +1 APPROACH

Quality of life is everything. It's the reason you do what you do to provide for those you love. It brings purpose and meaning to today while inspiring tomorrow.

Teamwork Adds Value (/our-story/our-win-win-plus-1-approach)

LIFE, TAKE 2

How will you spend the next exciting chapter of your life? Find out a few of the ways Planned Financial Services can help you shape tomorrow on your terms.

[Create Your Next Chapter \(/life-take-2/index\)](/life-take-2/index)

YOU UNDERSTAND HARD WORK

Your success didn't happen overnight. Your achievements are the result of significant effort, sacrifice, and the determination to build the lifestyle and wealth you now enjoy. That's why you require an independent financial steward skilled in investment, financial, and business matters who values you and your future, and places your interests first so you have the flexibility to define your path in life...

(http://

[Get Started \(/planning-for-life\)](/planning-for-life)

Want help? Let's talk.

WE DON'T WANT TO BRAG BUT...

Recent News and Press

JUNE 06, 2019 (/NEWSROOM/PRESS-RELEASES/PLANNED-FINANCIAL-

First Name* Last Name*

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How can we help you?*

Submit

SERVICES-FRANK-FANTOZZI-NAMED-NORTHEAST-OHIO-SMART-50-HONOREE)

Planned Financial Services' Frank Fantozzi Named "Northeast Ohio Smart 50 Honoree" (/newsroom/press-releases/planned-financial-services-frank-fantozzi-named-northeast-ohio-smart-50-honoree)

MARCH 19, 2019 (/FINANCIAL-INSIGHTS/FRANK-TALK/)

Frank Talk - 1st Quarter Newsletter (2019) (/financial-insights/frank-talk/)

SEPTEMBER 10, 2015 - FRANK FANTOZZI IS PANELIST AT SMART BUSINESS FAMILY BUSINESS CONFERENCE (HTTP://PLANNEDFINANCIAL.COM/NEWS-IN-THE-NEWS)

Addressing the real issues facing family-owned businesses every day (http://plannedfinancial.com/newsroom/press-in-the-news)

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