Objective and Independent Financial Advice With a Personal Touch

Pinnacle Investment Management, Inc. Puts Client Interests First

Since its founding in 1991, Pinnacle Investment Management has provided personalized service while offering the expertise and resources typically found in larger firms. “We serve our clients as a fiduciary and can be objective and independent of the investment product or strategy because we do not receive commissions or referral fees related to selling stocks, mutual funds or other investment products,” says John Eckel, CFP®, CFA, president of the Hartford-area firm. Eckel’s comments on investing have appeared in many prominent publications including *USA Today*, *Bloomberg Businessweek* and *SmartMoney*.

The Pinnacle Investment Management Team

“We’re a firm that is very responsive, yet our relationship with other advisors provides us with resources that are beyond what many small firms can offer.” – John Eckel, CFP®, CFA

Small-Firm Service, Big-Firm Resources

Pinnacle is affiliated with a small national network of select independent financial planning and investment professionals whose backgrounds include CPAs, Certified Financial Planners (CFP®), Chartered Financial Analysts (CFA) and insurance professionals. “We’re a firm that is very responsive, yet our relationship with other advisors provides us with resources that are beyond what many small firms can offer,” says Eckel, who has been named a top financial advisor four times by *Worth* magazine. He adds that every Pinnacle advisor is a CFP®, considered among the most respected professional designations in financial services.

“We know every client by name, not a number, and our goal is to serve them just as we would members of our own families,” says Claire Hahn, manager of client services. “Pinnacle has often visited clients in their homes or nursing homes after they have had an accident or illness, and performed extra services for individuals after they suffered a stroke. We also took a lead role in establishing a medical school scholarship in honor of a client who died prematurely.”

Eckel adds, “We’re truly their financial advisors who take a holistic look at their entire financial picture. We go well beyond investment management to offer advice on everything from tax, Social Security, retirement plan and stock option strategies to estate planning and charitable-giving considerations.”

Pinnacle serves business owners, corporate executives, doctors and other professionals, as well as nonprofit organizations and other institutions in the Hartford area and around the globe.

Client Education Helps Achieve Financial Goals

John Flanagan, CFP®, senior vice president, explains that part of Pinnacle’s personal touch is hosting client educational seminars featuring various experts who speak on a broad range of topics including fraud and identify theft, economic forecasting, Social Security benefits, taxes and retirement plans. “We believe that if we can increase their knowledge of issues which could affect their finances, it can help them make sound financial decisions, and, ultimately, help us assist them in reaching their financial goals,” he says.

PINNACLE
Investment Management Inc.

573 Hopmeadow Street | Simsbury, CT 06070 | 860-651-1716 | Pinnacle-Investment.com