



## **Excerpt Web Content - Inside Page Editing Sample**

### **INVESTMENT STRATEGIES**

Kee, Huchok and Pinnacle Wealth Planning Services, Inc. offer investment advisory services with integrated multiple investment disciplines and administrative functions. We provide a single high quality source to meet your investment advisory needs. Our philosophy is one of disciplined planning, flexibility, responsibility and a high level of monitoring for risk and performance.

### **INSURANCE ANALYSIS**

When was the last time you reviewed your insurance policies? Are they performing as expected? Most people buy insurance policies and store them in a safe place but rarely monitor performance. Because insurance policies contain a number of assumptions and have significant investment components, it is essential to review performance every two to three years. Working with Pinnacle Wealth Planning Services, Inc., Kee, Huchok can help you secure the proper coverage you need. We work with your insurance agent or go through our network of insurance experts to find the most appropriate coverage for you.

### **RISK ASSESSMENT**

A key element in any successful financial plan is assessing the risk tolerance of each investor. Kee, Huchok in collaboration with Pinnacle Wealth Planning Services works closely with all of our investment clients to ensure that your investment portfolio is balanced against your risk tolerance.

### **PERSONAL FINANCIAL PLANS**

Kee, Huchok and Pinnacle Wealth Planning Services offer comprehensive financial planning. We strongly believe every client needs a professionally prepared financial plan to help them identify and achieve their personal and financial goals. Each plan is reviewed at least annually to monitor financial projections and other important financial planning issues. By periodically reviewing your plan, corrective measures can be taken to keep you on track in achieving your financial goals.

### **COLLEGE PLANNING**

The increasing costs of a college education have made college planning necessary for most parents. Today there are many choices for funding a child's college education; from college grants and scholarships to tax deferred savings plans. Kee, Huchok will assist you in selecting the options that are right for you and your child. We will also help with completing the complex financial aid forms required to obtain the aid you need.