

William D. Heichel, JD, CFP®

Founder and President of Professional Planning Coordination Services, LLC



William D. Heichel founded Professional Planning Coordination Services (“PPCS”) in 2011, with the goal of putting qualified attorneys, CPAs and Fee Only RIAs in the position of “Lead Advisor” for their best clients by training them and licensing them to market and deliver “Professional Planning Coordination Services”. His 24 years in the practice of corporate, tax and estate planning law as a senior partner of a regional law firm and over 31 years as President and CEO of a nationally ranked financial wealth management advisory firm had taught Heichel that many attorneys, CPAs and Fee Only RIAs did not have the experience or technical know how to offer planning coordination services to their clients. Heichel founded Professional Planning Coordination Services to fill that void, with the belief that providing attorneys, CPAs and Fee Only RIAs with marketing programs, fully integrated back office administrative resources, proprietary PPC Service administrative and client portals, would easily allow them to meet their clients’ need for coordinated planning services.

[Professional Planning Coordination Services](#) represents the culmination of Heichel’s unique legal and financial industry experience. That experience encompasses a prominent career as a nationally recognized legal, financial and wealth management advisor, working with high and ultra high net worth clients and over 200 closely-held companies with revenues ranging from \$500,000 to over \$700 million. Heichel has prepared and delivered over 1000 Comprehensive Personal Financial Plans to high and ultra high net worth individuals and has assisted many clients with their complex business planning and wealth planning needs.

Heichel continues to be a principal in Pinnacle and is currently President of Professional Planning Coordination Services, LLC (“PPCS”) as well as, serves on various boards and foundations. Through these experiences, Heichel learned firsthand the adoption of best practices service is necessary to achieve success. He also learned that the vast majority of attorneys, CPAs and Fee Only RIAs lacked the expertise, experience and technical knowledge to elevate and differentiate their practices —so he founded PPCS to provide those attorneys, CPAs and Fee Only RIAs with an easy, cost effective and professional way to build their practices while providing a higher level of professional service to their clients.

William D. Heichel is widely recognized as a leader in the financial services sector. He has developed a highly acclaimed wealth management benchmarking tool for industry professionals. Heichel has been nationally ranked and recognized year-after-year by *Bloomberg’s Wealth Manager Magazine*, *Worth Magazine*, *Financial Advisor Magazine* and *Medical Economics Magazine*. Heichel has been interviewed several times by the *Wall Street Journal* and has been quoted in various articles dealing with family offices and client “Quarterbacking” services.

Heichel received his BA degree from [Kent State University](#) in 1966, a Juris Doctorate from the [University of Akron](#) in 1970, and a Certified Financial Planning (CFP®) designation from the [College of Financial Planning](#) Denver, Colorado in 1984.

PRESS KIT

PRIOR PRESS & MEDIA COVERAGE

William D. Heichel is consistently ranked nationally among the top professionals in the wealth management field by *Worth Magazine*, *Bloomberg's Wealth Manager Magazine*, *Financial Advisor Magazine* and *Medical Economics Magazine*

Pinnacle Wealth Planning Services, Inc. ("Pinnacle"):

Pinnacle nationally recognized as one of America's top wealth managers for ten consecutive years in *Bloomberg's Wealth Manager Magazine* (2002-2012).

Pinnacle nationally recognized as one of the leading Registered Investment Advisor (RIA) firms in the country by *Financial Advisor Magazine* (2006-2012).

William D. Heichel, JD, CFP®:

Pinnacle's President, William D. Heichel nationally recognized as one of the Top 100 Most Exclusive Wealth Advisors in the United States by *Worth Magazine* (2004-2008).

Pinnacle's President, William D. Heichel nationally recognized as one of the 150 Best Financial Advisors for Doctors by *Medical Economics Magazine* (2006-2010).

PRESS KIT
FACT SHEET

- [Professional Planning Coordination Services, LLC](#) (“PPCS” or “PPC Services) founded in 2011.
- Founder and President, [William D. Heichel JD, CFP®](#) has been in the investment advisory and wealth management business for 46 years in various capacities.
- PPC Services’ main office is located at Six West Third Street, Suite 200, Mansfield, Ohio 44902 with additional offices in Columbus, Cleveland and Medina, Ohio.
- PPCS’ credentialed staff has more than 150+ years of experience representing affluent individual, attorney and CPA client bases throughout the United States and Puerto Rico.

PROFESSIONAL CREDENTIALS:

William D. Heichel is an [AV rated lawyer](#) which is the highest rating a lawyer can receive from Martindale Hubbell, the national rating service for lawyers. He is a member in good standing of the, [Ohio Bar Association](#), [Richland County Bar Association](#), [Financial Planning Association](#) and is a member of the Probate and Real Property Law Section and the Business Law Section of the Ohio Bar.

- Heichel spent 36 years in the practice of law and was the senior partner of a prestigious Ohio regional law firm.
- He has been in the financial planning and investment advisory business for over 40 years with several of those former years as the senior trust officer of a large Ohio regional bank trust department.
- Mr. Heichel spends his professional time working with closely held business owners and high net worth individuals and their families, helping them achieve their personal, financial, business and investment goals.
- Heichel has delivered over 1,000 comprehensive financial plans to clients whose aggregate net worth’s exceed two (2) billion dollars.

CHRONOLOGICAL CAREER HISTORY:

- (1966-1976) Heichel started his professional career in 1966 as a trust officer at a regional bank in Canton, Ohio and ended his trust career in 1976 as the Senior Trust Officer of a large regional Trust Department.
- (1976) He joined the law firm of Calhoun & Benzin in 1976 to provide estate and business planning for the firm’s closely held business owners and served as a senior partner.
- (1979) Founder and CEO of Lifetime Planning, Inc., a fee-only financial planning and investment advisory firm serving over 200 clients in fourteen states.
- (1997) Founder and CEO of Pinnacle Wealth Planning Services, Inc., a SEC Registered Investment Advisor with over \$500 million of investment assets under administration and one of Ohio’s oldest and largest fee-only Wealth Management firms with specialized staff credentials such as JD, CPA, CFP®, ChFC®, MBA, PFS, AAMS®, CPS® and CMFC®
- Presently, Pinnacle works exclusively with licensing attorneys and CPAs, as Pinnacle Advisors®, to deliver with Pinnacle, wealth management services to their high net worth clients. Pinnacle has offices in Mansfield, Medina, Cleveland and Columbus and is one of the largest fee-only wealth management and investment advisory companies in Ohio dealing exclusively with CPAs and attorneys.
- (2011) Heichel established Professional Planning Coordination Services, LLC (“PPCS”) to license attorneys, CPAs and Fee Only RIAs and help them coordinate the wealth planning needs of their individual, family, business, non-profit, trust and estate administration clients.

William D. Heichel, JD, CFP®

NATIONALLY RANKED AND RECOGNIZED IN MAJOR PUBLICATIONS:

2002-2013 – William D. Heichel has been consistently ranked nationally as a top professional in the wealth management field by *Worth Magazine*, *Bloomberg's Wealth Manager Magazine*, *Financial Advisor Magazine* and *Medical Economics Magazine*

- *Bloomberg's Wealth Manager Magazine/Advisor One Magazine* has named Heichel's Pinnacle to their list of Top Wealth Managers for ten consecutive years (2002-2012) as well as ranking Pinnacle the 2nd fastest growing firm in the Nation in 2001. *Worth Magazine* recognized Heichel as one of the Top 100 Most Exclusive Wealth Advisors in the United States.
- *Financial Advisor Magazine* has recognized Heichel's Pinnacle as one of the leading Registered Investment Advisor (RIA) firm in the United States for six consecutive years (2006-2012).
- Heichel as been nationally recognized by *Medical Economics Magazine* as one for the 150 Best Financial Advisors for Doctors (2006-2010) – published Bi-Annually.
- Heichel has been interviewed several times by the *Wall Street Journal* and has been quoted in various articles dealing with family offices and client "Quarterbacking" services.

SPEAKING ENGAGEMENTS & ARTICLES:

William D. Heichel has spoken frequently throughout the United States about wealth planning topics and has been quoted in national publications on a variety of business and personal planning issues.

- Heichel continues to be a keynote speaker at various legal and financial planning seminars.
- William Heichel is frequently sought by the media to contribute to wealth planning and financial industry articles such as the September 14, 2012, Wall Street Journal article titled, [A 'Quarterback' to Oversee Your Investments](#).

A PPC SERVICE BROCHURE IS ENCLOSED

WHY SHOULD YOU OFFER
PROFESSIONAL PLANNING COORDINATION SERVICES?

- 1 ELEVATE & DIFFERENTIATE YOUR PRACTICE
- 2 YOUR BEST CLIENTS NEED AND WANT A PROFESSIONAL PLANNING COORDINATOR AND THEY PREFER TO USE THEIR MOST TRUSTED ADVISOR FOR THIS SERVICE. (SEE THE ARTICLE IN THE TRUSTS AND ESTATES JOURNAL NOVEMBER 2011 ISSUE TITLED "THE QUARTERBACK DILEMMA").
- 3 THE PPC SERVICE IS AN ADMINISTRATIVE SERVICE, WHICH MARKEDLY REDUCES YOUR PROFESSIONAL LIABILITY IN DELIVERING THE SERVICE.
- 4 DELIVERING PPC SERVICES TO YOUR BEST CLIENTS ENHANCES YOUR PERSONAL AND PROFESSIONAL RELATIONSHIP AND CONTINUES TO PROMOTE YOU AS THE CLIENT'S AND THEIR FAMILY'S "LEAD ADVISOR".
- 5 YOUR TIME COMMITMENT IS MINIMAL, BECAUSE PPCS PROVIDES:
 - ✓ TURNKEY PLANNING MEETING AGENDAS
 - ✓ SECURE CLIENT SPECIFIC WEB PORTAL WHICH CONTAINS CLIENT'S:
 - SCANNED DOCUMENTS IN LICENSEE'S CLIENT'S SMARTVAULT
 - DAILY TRACKING OF CLIENT'S INVESTMENT PORTFOLIO
 - FINANCIAL PLAN (IF AVAILABLE)
 - INVESTMENT PERFORMANCE ON-DEMAND
 - TAX RETURNS
 - ✓ FORM LETTERS FOR LICENSEE TO SEND TO CLIENT AND CLIENT'S ADVISORS
 - ✓ EXTENSIVE PPC SERVICES LIBRARY OF FORMS
 - ✓ PPC SERVICES PROFESSIONALLY DESIGNED MARKETING PROGRAMS
- 6 GENERATE PREMIUM REPETITIVE HOURLY INCOME PROVIDING PPC SERVICES TO YOUR BEST CLIENTS, WHILE GIVING THEM WHAT THEY NEED AND WANT, WHICH IS YOU BEING THEIR PROFESSIONAL PLANNING COORDINATOR.

Professional Planning Coordination Services
Offers Three License Types

TO OFFER PPC SERVICES, YOU NEED TO PURCHASE ONE OF THE FOLLOWING THREE LICENSES FOR THE OHIO COUNTY WHERE YOUR OFFICE IS LOCATED. THERE ARE THREE TYPES OF LICENSES AVAILABLE:

TYPE I: Non Exclusive Territorially Restricted License.

TYPE II⁽¹⁾: Non Exclusive Territorially Restricted License with a "Right of First Refusal" and an "Option" to Convert to a Type III Exclusive License.

TYPE III⁽¹⁾: An Exclusive Territorially Restricted License

⁽¹⁾ Not available in some larger Ohio counties



ELEVATE & DIFFERENTIATE YOUR
CLIENT SERVICE OFFERINGS™

with
PROFESSIONAL PLANNING COORDINATION SERVICES
for
INDIVIDUAL, FAMILY, BUSINESS,
NON-PROFIT, TRUST AND
ESTATE ADMINISTRATION CLIENTS

www.ProfessionalCoordinator.com

To learn more about
Professional Planning Coordination Services

Visit our Website

www.ProfessionalCoordinator.com

Email

Tonya Bowersock

Director of Marketing-Licensee Sales & Services

Admin@ProfessionalCoordinator.com

Call

1.866.998.2737 Ext. 5

to schedule a Webinar Presentation

or

a Meeting with a PPCS Representative

Professional Planning Coordination Services, LLC
(Offices in Mansfield, Cleveland, Columbus & Medina)

YOU MARKET



WE PREPARE



YOU DELIVER





MAKE A REAL DIFFERENCE IN YOUR BEST CLIENTS' LIVES BY DELIVERING PROFESSIONAL PLANNING COORDINATION SERVICES ("PPC SERVICES").

WE CAN SHOW YOU HOW

The PPC Service is a sophisticated web-based planning coordination service that automatically raises your status from being just one of your client's advisors to being your client's "Lead Advisor". This is accomplished by your client retaining you as their Professional Planning Coordinator ("PPC"). PPC Services are designed to meet the ever increasing demands of your best individual, family, business, non-profit, trust and estate administration clients for professional planning coordination assistance in:

- ✓ Organizing and uploading your client's personal, business and financial documents into your client's portal.
- ✓ Keeping your client's data current.
- ✓ Providing 24/7 web access to your client's personal information, financial information and related documents.
- ✓ Providing a disciplined approach to your client's planning efforts, as well as the efforts of their advisors.
- ✓ Requiring your client's advisors to evaluate the planning topics assigned to them and making written observations, judgments and recommendations.
- ✓ Requiring regular planning meetings (i.e. one to four meetings per year) with formal agendas for your clients and your client's advisors.
- ✓ Following up with your client's advisors until all of the action items have been completed.



EXPERIENCE THE Professional Planning Coordination Service

DIFFERENCE

Professional Planning Coordination Services, LLC IS COMMITTED TO HELPING YOU BECOME YOUR CLIENTS' "LEAD ADVISOR", WHILE INCREASING YOUR ANNUAL REPETITIVE INCOME FROM YOUR INDIVIDUAL, FAMILY, BUSINESS, NON-PROFIT, TRUST & ESTATE ADMINISTRATION CLIENTS.

YOUR CLIENTS HAVE THE OPTION OF CHOOSING ONE OF SEVEN PPC SERVICES

THREE INFORMAL PPC SERVICES

CLIENT PPC SERVICE "LITE" - One Meeting a Year.

CLIENT PORTAL PPC SERVICE includes Single Sign-On (SSO) for secure access to their:

1. Document Vault
2. Portfolio Asset Tracking and Performance Reporting
3. Financial Plan
4. No Planning Meetings Required

CLIENT PPC SERVICE "LITE" & CLIENT PORTAL PPC SERVICE - COMBINED - One Meeting a Year.

FOUR FORMAL PPC SERVICES
(* Includes the Client Portal PPC Service)

THE BASIC PPC SERVICE* - Designed for clients with a Net Worth under \$3M and/or income of less than \$250K. Requires One (1) Planning Meeting a Year.

THE LIFETIME PPC SERVICE* - Designed for clients with a Net Worth of \$3M - \$5M and/or income of \$250K-500K. Requires Two (2) Planning Meeting a Year.

THE ENHANCED PPC SERVICE* - Designed for clients with a Net Worth of \$5M - \$10M and/or income of \$500K-\$1M. Requires Three (3) Planning Meetings a Year.

THE COMPREHENSIVE PPC SERVICE* - Designed for clients with a Net Worth in excess of \$10M and/or income in excess of \$1M. Requires Four (4) Planning Meetings a Year.