

WHAT IS PROFESSIONAL PLANNING COORDINATION SERVICES, LLC? ("PPCS")

Professional Planning Coordination Services, LLC ("PPCS") is an Ohio Limited Liability Company formed for the exclusive purpose of licensing and administratively supporting:



in their Fiduciary role as the Professional Planning Coordinator ("PPC") for their Individual, Family, Business, Non-Profit, Trust and Estate Administration Clients.

PPCS' staff is highly regarded professional fiduciaries with experience in the legal, financial planning, investment management, accounting, wealth management and risk management sectors. With over 150+ years of experience in one or more aspects of the wealth management business, these professionals have collectively created the Professional Planning Coordination Service for their own wealth management practice and have decided to share their success as Professional Planning Coordinators with other high caliber professional fiduciaries. It is extremely important to all the shareholders, directors, officers and employees of PPCS that all Professional Planning Coordinators be professionals who act as fiduciaries to their clients under state and/or federal law.