CONFIDENTIAL PLANNING
Member of Pinnacle Family of Companies

A GUIDE TO YOUR RETIREMENT

How to Save and Invest for Retirement

Confidential Planning began in 1975 as an independent financial services company specializing in retirement planning and investment advice. After joining the Pinnacle Family in 2006, Confidential Planning introduced the MultiChoice™ 403(b) Plan to school districts throughout New York State. With over 30 years of experience as a full service organization, we now focus on the unique financial needs of educators and employees of school systems, universities, hospitals, and non-profit organizations. At Confidential Planning, we provide a professional approach to integrated financial services and offer our clients superior, personalized customer service, sound advice, and a diversified range of investment products. Headquartered in Syracuse, New York, we have a presence throughout the Northeast.

WHY CHOOSE MULTICHOICE?™

- Fiduciary standard. Work with a company who works for your best interest, not for their own.
- Higher contribution limits than an IRA. Payroll contributions into your 403(b) plan help to maximize your tax deferred contributions each year.
- Employee contributions to a 403(b) lowers your taxable income. Speak with your tax preparer to understand how this benefits you.
- Skip the annuity; invest in institutional shares directly with MultiChoice™.
- Multiple investment companies to choose from; it's in the name. Choosing MultiChoice™ means that you can invest in a variety of top rated fund companies.
- Building the right plan for you. Working with Confidential Planning gives you a Financial Advisor on your side. You can take part in many of our financial wellness programs just by having an account.

OUR SERVICES

Plan Consultations

One on One Reviews

Financial Planning

Estate Planning

Retirement Income Evaluation

Pension Maximization

Life Insurance and Long Term Care Solutions

College Savings Programs

YOUR DEDICATED TEAM OF ADVISORS

Confidential Planning offers an experienced team of Registered Financial Advisors working as your fiduciary so you can be assured that your best interests are being looked after. Talk to one of our advisors today about building a plan.

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