



Pinnacle Wealth Management Merges With TC Planning Specialist

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Pinnacle Wealth Management located in Brighton MI, and TC Planning Specialists, located in Commerce Township MI, have recently merged.

Pinnacle Wealth Management is an independent, Michigan Registered Investment Advisor firm. Pinnacle specializes in Holistic Wealth and Tax Planning.

Andrew Perri, President of Pinnacle Wealth, has been in the wealth management and tax industry for 21 years serving many hundreds of families throughout the country. He is an Accredited Investment Fiduciary and Registered Financial Consultant.

Terry Sammon, President of TC Planning Specialists, has been in tax planning, tax preparation and retirement planning since retiring from the automotive Tier 1 segment in 2005. Sammon has served over a thousand clients in the Detroit metropolitan area as well as in many states outside Michigan.

Sammon is an Enrolled Agent, a Retirement Income Certified Professional®, and a member of the Ed Slott

Elite IRA Advisor Group.

Says Perri: "I was very excited to start working with Terry. His passion, heart, devotion, and expertise shone through almost immediately. It didn't take us long to figure out that we could provide our clients a more powerful solution by merging our companies. We have the same culture, the same values, and the same focus, so it truly is a match made in heaven."

"I couldn't be happier," says Sammon. "Combining our businesses and outstanding team members along with our extensive network of support professionals allows us to provide unique comprehensive planning services to our clients. I am particularly pleased that the disciplined planning process we follow meets the new standards of the Department of Labor as being entirely in the best interest of our clients. A true fiduciary role!"

Sammon continued: "Andrew and I have become great friends. We first met at a continuing professional education event on Tax and Retirement Income Planning Techniques and immediately hit it off. Over the many months leading up to our merger, Andrew and I have worked together with potential clients in their actual planning meetings. We have also both participated in a series of community education workshops in the Brighton area. Through this hands-on interaction between us, our staffs and our clients, we overwhelmingly validated that a merger would indeed be best for our clients."

As a result of the merger, TC Planning Specialists in Commerce will now be Pinnacle Wealth & Tax Management. Sammon will also assume the position of Director, Business and Tax Consulting for the Pinnacle Companies.

All client services will be provided at both the Brighton and Commerce locations. The staff remains unchanged although an increase in staff at the Commerce location is anticipated.

More details can be obtained at www.pinnaclewealthonline.com.

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For more information about Pinnacle Tax Advisory, contact the company here: Pinnacle Tax Advisory
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Pinnacle Tax Advisory

We move people from surviving to thriving, from living in the ordinary to living in the extraordinary. A holistic plan to help grow and preserve both wealth for the purpose of leaving a legacy in their family, business and community.

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