PINPOINT WEALTH PARTNERS:
LAUNCH OF NEW FIRM CREATES A LASTING LEGACY

We are pleased to announce the launch of Pinpoint Wealth Partners, a Florida based boutique insurance advisory firm comprised of a leadership team including Richard H. Proctor, Jr., Michael G. Penney, Will Dudley, and Tiffany Matusz.

Throughout years of partnering together on a case-by-case basis, the time has come to join forces and implement a succession plan of their own. "Michael and I have built our careers around helping clients navigate through the complexity of estate and business succession planning," Rick explains. "It is a natural next step to join forces with Michael and bring Will Dudley onto our leadership team, not only for a fresh perspective but also to serve our current and future clients."

Built on the foundation of a national platform, Pinpoint Wealth Partners has developed a team approach to create the best possible solutions for their clients' long-range planning needs and to also provide for the consistent long-term servicing of those plans. As change comes to the business, the firm will be prepared to help clients adapt accordingly.

"We work diligently to provide our clients with the peace of mind that they have done everything within their power to plan for their businesses and the people they care about the most," Michael commented. "We are absolutely thrilled to join forces and partner on a deeper level and develop a more holistic approach for those whom we serve." The team often partners with estate planning attorneys and tax professionals to align and help achieve client goals. Will Dudley adds, "bringing everyone together from our team, along with strategic partners, I believe we will be able to provide tremendous value and create a more cohesive platform for the clients and professional advisors with whom we work."

The team will remain located in the same office location in Winter Park, Florida, however, they will continue to serve clients on both a local and a national level.

PINPOINT

WEALTH PARTNERS

Securing lasting and successful outcomes for individuals, families and businesses.

Pinpoint Wealth Partners is a boutique life insurance advisory firm, serving clients throughout all walks of life. The firm is built on the knowledge from seasoned advisors over the past four decades combined with youthful insights from advisors of the next generation. This allows the team to provide a dynamic understanding of how to best serve clients, both for today and for generations to come.

◆ Life Insurance ◆ Estate Planning ◆ Business Planning ◆ Estate Equalization
◆ Executive Compensation ◆ Buy-Sell ◆ Key Man Insurance
◆ Bank-Owned Life Insurance (BOLI) ◆ Premium Finance ◆ Policy Review
◆ Wealth Accumulation ◆ Charitable Planning ◆ Life Settlements
◆ 1035 Exchanges ◆ Disability Insurance ◆ Foreign National Opportunities

1089 West Morse Blvd.
Suite C
Winter Park, FL 32789