"The true success of any firm is measured by the success its clients. Having a positive impact on their lives is the goal we strive to achieve every day."

- Carl Mahler

Our mission is to offer you confidence knowing your life goals and investments are carefully and completely managed to their fullest potential. We offer our clients the ability to focus on the other important things in their lives by building financial plans and investment strategies designed to meet their personal and financial goals. Let us put our skills and experience to work for you.

THE PINNACLE GROUP

An Independent Firm

www.pinnaclegroup.net

3748 Winterfield Road • Midlothian, Virginia 23113

804.378.1624 • Fax 804.378.1625

THE PINNACLE GROUP

An Independent Firm

Orchestrating Your Financial Future

Your Wealth. Your Life. Our Focus.

"To accomplish great things, we must dream as well as act."

Anatole France

The Director:

The pace of life today is challenging. Job requirements, family matters and social commitments leave little time for anything else. Planning your financial future, while hugely important, gets pushed further back every day. Each of us has particular strengths and weaknesses. It is important to understand both, to capitalize on your core efficiencies and seek help in weaker areas. You need a partner capable of understanding your personal life goals. Trust our expertise and years of experience when it comes to orchestrating your financial decisions.

The Ensemble:

Making the decision to work with an advisor is only the first step. Identifying that individual from the myriad of choices in today's marketplace is a daunting task. We offer investment management services through Raymond James Financial Services, Inc., with whom we are recognized in the top 1% of RJFS advisors in the nation. Serving the Richmond community and beyond, we blend a professional approach with individualized attention, resulting in a rewarding financial and personal relationship with each of our clients.

The Arrangement:

Every client's needs are unique, with different financial objectives, time horizons, risk levels and expectations for returns. There is no one plan that fits every individual. We begin by listening to your personal vision, your values and goals. Then, and only then, we compose strategies designed to achieve your objectives. We are truly independent financial advisors, offering customized solutions, free of commissions and proprietary products. With our process, you begin at a different place, thereby ending at a VERY different place.

"We're committed to exceeding client expectations and maintaining the highest level of integrity."

G. Carl Mahler, Jr., CFP®

The Performance:

If you have been turned off by some of the larger, more impersonal investment companies, we are confident you will find our approach very refreshing. Our team at The Pinnacle Group strives to establish a personal and long-term relationship with each of our clients, offering unparalleled one-on-one attention and service. Let us provide you with the confidence that comes from knowing that you have an experienced partner directing you towards the fulfillment of your dreams.

We are driven to help you succeed!

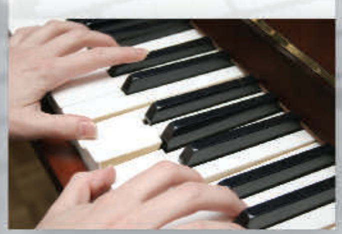
A Symphony of Services. *Independently, each service is vital. Together, they work in harmony to help preserve and build your wealth.*

Investment Planning

We custom design plans to achieve your goals, analyze the many investment strategies and products available, and then direct your assets to those that will help meet your objectives.

Tax Planning

We review your tax planning goals, assets and cash flows to develop a plan of action to help reduce, eliminate or postpone projected tax liabilities and help your investments work as efficiently as possible.

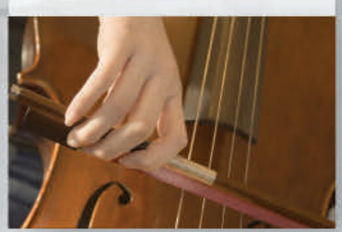


Retirement Planning

Our professionals help you analyze your current financial situation, consider the obstacles that lie ahead, and offer a road map to help you meet your goals for financial independence.

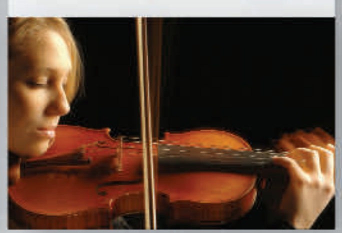
Protection Planning

Protecting against major financial losses such as disability, nursing home costs, catastrophic medical expenses or property loss is needed to help insure financial success.



Estate Planning

Assets, liabilities, bequests, and disposition of your estate are evaluated to help plan for liquidity and to potentially provide for your family's needs, then our recommendations are coordinated with your attorney.



Life Planning

We offer much more than just wealth management. We will assist you with every facet of your financial life, from developing small business plans or saving for college to financing a home or car.