

**As Seen In... Forbes, October 11, 2010**

### Making Beautiful Music

Many people's lives are unnecessarily complicated with financial matters: investments, loans, insurance, real estate, saving for college, retirement, trusts, estates, taxes, philanthropy and more. There's nothing wrong with any of these, but there is something to be said for balance and harmony in life, with coordination, cooperation and a clear-eyed view of the big financial picture. Likewise, there is something to be said for advisors who offer clients all this and more. The advisors at The Pinnacle Group have a history of orchestrating the financial lives of people in the Richmond community and beyond.

The Group is much more than the typical advisory firm. "We're highly qualified to coordinate all of our clients' financial affairs," says Carl Mahler, president. "We're experienced and efficient. Many of our clients have worked with attorneys, CPAs and financial advisors in the past. That's great. But what's been missing is a coordinator to oversee everything and eliminate inefficiencies." Mahler specializes in bringing everything together in harmony. By creating order out of potential chaos, he helps keep his clients on track to reach their goals. And his number one goal is to be their most trusted advisor.

#### Always on the Point

"We want to present ourselves not only as the

company to shepherd our clients' financial assets, but to be their financial point person," says Mahler. "We realize that a lot of people who have achieved success in their professional lives lack the time, energy and training to reach the same level of success in their financial lives. They need to bring in a professional, and we have the background to fill that role."

With 41 years of experience in financial services, Mahler brings a wealth of knowledge to his clients. He was named to *Barron's* 2010 Top 1000 Advisors in America, and for the fifth year in a row was named to the Raymond James Chairman's Council.\* He was also featured in *The Wall Street Journal* in July 2009

for a speech he delivered at a Raymond James national conference. In addition, Mahler is recognized as being in the top 1 percent of Raymond James Financial Services advisors in the nation, based on total assets under management.

#### A Small but Mighty Staff

The Pinnacle Group itself can best be described as lean and mean. This small company boasts a high-performing six-person staff. Very professional and highly responsive, the firm stands out for being unusually caring in everything it does. "I have great people around me," says Mahler. "We see to it



Carl Mahler, President

that our clients get a lot of personal attention."

Many of the Pinnacle Group's clients have been with the firm for a long time and are like family to Mahler and his staff. "We have many multigenerational clients. We've been with them through all kinds of life events, everything from graduating from college to choosing a retirement community," he says. "Whatever it is, we've been there and we've been intimately involved with them. Over time, we see the impact we have on their lives. We can see the fruits of our labor. It's rewarding to us and, hopefully, more so for our clients."



### THE PINNACLE GROUP

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\**Barron's*-The list is a state-by-state ranking of America's top financial advisors. The rankings reflect advisors' assets under management, revenue generated for their firms, quality of service, regulatory records and charitable work among other factors. Past performance is not indicative of future results. Individual experiences may vary. Chairman's Council membership is based mainly on assets under management, education, credentials and fiscal year production. Re-qualification is required annually since prior membership is no assurance of future membership.