

MEMBERS ON THE (BLOG)SPOT



PRODUCTS/SERVICES OFFERED

Financial Planning, Investment Management, Insurance, and Business Planning Services.

CONTACT INFO

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Keith Piscitello is a registered representative of Lincoln Financial Advisors Corp. Securities and investment advisory services offered through Lincoln Financial Advisors Corp, a broker/dealer and registered investment advisor. Insurance offered through Lincoln affiliates and other fine companies. Simply Sophisticated Wealth Planning is not an affiliate of Lincoln Financial Advisors Corp.

Members on the (Blog)Spot is a monthly feature of member businesses of the Clive Chamber of Commerce. If you are interested in having your business featured, contact kschmidt@clivechamber.org.

• Keith Piscitello, owner of Simply Sophisticated Wealth Planning has been
• a financial planner for over 15 years and recently moved to Clive from the
• Chicagoland area. As a way to make new connections in the community he
• joined the Clive Chamber this August.

• Fear and misunderstanding of key financial issues in the average American's life
• leads to costly mistakes and missed opportunities. Keith runs a financial planning
• firm that brings complex and sophisticated strategies to families and businesses
• in a manner that is easy to digest and beneficial to implement. He utilizes several
• similes, metaphors, and symbols to help clients understand complex concepts.

• Simply Sophisticated Wealth Planning takes a multidisciplinary approach to
• Financial Planning, looking at things not only through an investment, legal,
• or insurance perspective but across the board. This perspective allows them
• to identify coordination gaps and missed Financial Planning opportunities
• that could result in massive additional wealth, tax savings, or addressing
• problems their clients weren't aware of.

• Keith's spouse was involved in senior housing for many years, and he saw
• first-hand the challenges and concerns families face with making the best
• decisions for aging parents. They often do not know what questions to ask,
• what to expect, or who to turn to when they learn the high cost of care
• and retirement living. Keith shows them what is possible. He specializes in
• helping seniors and their adult children transition to retirement living when
• the need for care exceeds what the children can manage on their own.

• Keith believes that financial concepts should not be a foreign language. Which
• is why his clients feel a sense of ownership and control over their situation.
• They benefit from a sense of clarity and contentment of knowing that they
• are taking steps to achieve the vision of their best life moving forward. Life
• changes, plans should change too.

• Clive Chamber of Commerce members can schedule a complementary consultation
• where Keith will review your existing plan and provide an executive summary
• showing what red-flags and gaps that may need addressing. To reach Keith and
• learn more about Simply Sophisticated Wealth Planning visit www.S2Wealth.com,
• call 847-917-0076 or email Keith.Piscitello@S2Wealth.com.