

THE
[PREFERRED]
CLIENT GROUP, LLC
your personal financial concierge

The Preferred Client Group is *your personal financial concierge* helping you to make business and personal decisions and becoming the single source to facilitate your financial affairs.

GARY M. BEINHAKER

Gary is a Chartered Financial Consultant(ChFC) and Chartered Life Underwriter(CLU) who works with business owners and executives in the areas of net worth creation and conservation. With over forty years of experience, his specialties include executive compensation, estate conservation, and employee benefits.

VINCE CIRIANNI

Vince is a financial representative who specializes in working with business owners and executives on business, personal, and estate planning strategies. With over sixteen years experience in the industry, his primary goal is to provide professional insight and unique planning strategies to help clients accumulate and protect their wealth.

DAVID W. CERCHIO

David is a financial advisor with a Masters in Business Administration in finance and marketing who concentrates his efforts working with closely held businesses, their executives and families. Through innovative business and value maximization techniques, David develops maximum wealth potential for his clients by examining their entire financial picture and suggesting sound financial decisions.

ADAM T. KAZALSKI

Adam is a financial advisor who works with professions, executives, and entrepreneurs developing strategies for wealth accumulation and protection. With over ten years of experience, he is committed to creating security and prosperity for the individuals and families he serves by providing education, coaching and execution of macroeconomic strategies.

JEANNE A. MOIR

Jeanne is the team practice manager and has been in the insurance and investment industry for over eighteen years. She is an expert in the coordination process of financial planning and serves as a Client Relations and Services Specialist. She builds each client's professional team based on her experience developing client-advisor relationships.

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