



PRESS RELEASE

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FOR IMMEDIATE RELEASE

Title: Peak Advisor Alliance nominates Financial Independence Planning (FIP) as 2017 Practice of the Year

Conshohocken, PA March 17, 2017 – Financial Independence Planning (FIP) was nominated as Practice of the Year, from over 1000 financial planning firms across the nation by the Peak Advisor Alliance. This is the consulting arm of Peak Advisors, headed by Ron Carson, one of Barron’s top 100 Financial Advisors in the United States.

Peak Advisor Alliance’s Practice of the Year nominees were selected by their coaches according to criteria such as implementation of the Peak Advisor Alliance program, achievement of personal and professional goals, and practice success. When nominating members, the coaches also considered:

1. Would I trust my family’s investments with this advisor?
2. Would I work for this advisor?

Asked what factors contributed to the nomination, CEO and Founder of FIP, Harry Keller commented, “The key factors contributing to the 2017 practice of the year nomination: for over twenty years we have fine-tuned our 8-step financial planning process. It is well documented and we conduct weekly team training to reinforce the quality of client services.”

“In addition, for the last five years we have had a proactive advisory board made up of ideal clients sharing their best ideas to improve our business processes, client educational and fun events and our client services. Since 2010, our experienced investment committee has developed and monitored allocation models according to our strict investment policy; we have developed strong, experienced client services team with a growth path to financial advisor, if they choose. We have a retirement package for our senior advisors and have successfully merged several advisors with over 20 years in business into our advisor team. We have an active calendar of client educational and fun events, including quarterly educational events at three regional locations and various fun events through the year. In addition FIP purchased their regional headquarters building in Conshohocken last year and had a well-attended ribbon cutting conducted by the Main Line Chamber of Commerce.”

Peak’s consulting coach, Greg Optiz noted, “Peak has coaches to help advisory firms strategize and reach their full potential. Harry’s group has done an outstanding job making sure the client is #1 through a systematic process that he has finely honed for close to 30 years.”

“I grew up in this business and thought that it was important for my father to join Peak to help us mature to the next level of client experience and service,” commented Jared Keller, one of the FIP advisors. “It is rewarding to be recognized for the effort made to create a strong process that allows

us to achieve our mission -- a sound plan should free up your time from worrying about money to enjoying all the things in life that are most important to you.”

About Financial Independence Planning

Financial Independence Planning, LLC™ (FIP), based in Conshohocken and Lansdale, is a [full-service](#) financial services firm serving mainly Bucks, Chester, Delaware, Montgomery and [Philadelphia](#) counties. The firm executes a proprietary 8-step FIP [financial process](#) primarily for clients in retirement and “pre-retirement” to help optimize their assets. The FIP process helps identify objectives and potential roadblocks early by mapping out a [FIP Road Map](#). Through constant monitoring, quarterly calls and annual reviews, FIP advisors help clients stay on track to not worry about money and enjoy all the things in life that are important to them. The firm’s online [client collaboration](#) tools enable clients [24/7 secure access](#) to their portfolio. The firm also provides educational seminars, a schedule of these events are on [www.myfipadvisor.com](#).

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