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## For Immediate Release:

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### **Planned Financial Services (PFS) Selected as a Weatherhead 100 Upstart Company Winner for 2011**

**Cleveland, Ohio, November 2, 2011---** **Planned Financial Services (PFS)**, for the fourth time, was named a Weatherhead 100 Upstart company. The prestigious annual award is presented by the Case Western Reserve University Weatherhead School of Management in partnership with the Council of Smaller Enterprises (COSE) to Northeast Ohio's fastest growing companies. It recognizes the success of local businesses and demonstrates the strength of the entrepreneurial spirit in the region. When asked how PFS was able to retain its position as one of the regions fastest growing companies when the economy and markets have been volatile, President and CEO Frank Fantozzi attributed the firm's success to its team and philosophy. "Our business exists for one reason," Fantozzi stated. "We are committed to helping our clients succeed in obtaining their best possible Return on Life<sup>TM</sup> ...their personal defined measure of success which aligns their finances with what they feel defines them."

PFS will be honored amongst its peers and other professionals at a black-tie gala in December at the Weatherhead 100 Awards dinner at Executive Caterers of Landerhaven. Fantozzi says he can best describe his firm's success by borrowing a quote from Wayne Gretzky that mirrors what his firm strives for daily: 'I skate to where the puck is going to be, not to where it has been'. Fantozzi states further that, "This is true of everyone at PFS because our clients seek our insight. They want to avoid problems and take advantage of opportunities. This takes a firm that is always thinking ahead."

The team at PFS believes that achieving your goals and dreams does not happen by simply handing over control of your assets and your future, but in ensuring your unique voice is heard and your vision reflected in every decision. This philosophy helps to shape each client's unique Return on Life<sup>TM</sup>, an individually-defined measure of success that goes well beyond investment performance. PFS focuses on developing long-term partnerships built on mutual trust and respect that begin with asking questions and listening carefully, not making assumptions. They believe that awareness, shared by client and advisor, is what makes opportunities visible and leads to confidence and clarity in pursuing goals.

PFS has had a strong presence in NEO since 1994, and now advises clients in more than 10 states, and currently employs six team members. The firm provides the full suite of financial advisory and investment services including several unique programs it developed to meet specific client needs: Wealth Plan<sup>TM</sup>, Divorce Right<sup>TM</sup>, Family Office<sup>SM</sup>, and Balancing Act<sup>SM</sup>. Business services offered by PFS include 401(K) Plus<sup>SM</sup>, Executive Benefits, and Succession Management.

For more information about the many services offered by PFS, contact Fantozzi at [Frank@PlannedFinancial.com](mailto:Frank@PlannedFinancial.com) or by phone at 440.740.0130 (x. 222).

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