



Kelcie Witmer



Zachary Allegretti

## **HBKS® Wealth Advisors Announces Staff Expansion**

HBKS® Wealth Advisors is pleased to announce two key additions to the staff in separate offices of the Firm.

Joining the team in the Boardman, Ohio office is Kelcie Witmer.

Kelcie has a strong accounting background and comes to HBKS® with four years' worth of experience in public accounting. She recently passed all sections of the CPA exam and is awaiting her official certification in the state of Ohio.

A Summa Cum Laude graduate of Youngstown State University with a Bachelor of Science in Business Administration degree, Kelcie was also the Captain of the YSU Cross Country and Track and Field Teams during her college career.

An accomplished professional specializing in complex audit work for individuals and corporations, Kelcie also has experience in pension auditing and corporate tax.

She is a member of the Ohio Society of Certified Public Accountants and the Mahoning Valley Young Professionals. Active in her home church of Greenford Christian, Kelcie is a member and former president of the Institute of Management Accountants, as well.

“We are thrilled to welcome Kelcie onto our team and are already seeing positive results from her strong work ethic and engaging personality. She will be a terrific asset to our firm and most importantly to our clients,” said Richard Morrow, CPA, CFP® and Senior Financial Advisor in the HBKS® Boardman office. He is also a Principal in the Hill, Barth and King LLC Boardman office.

Moving over to the Keystone state, HBKS® is equally pleased to welcome Zachary Allegretti into the Firm's Pittsburgh office.

“HBKS is excited and my client service team in particular, to have our new member Zack Allegretti as part of our group,” said Gregory Sorce, CFP®, MSFS and Partner/Senior Financial Advisor of the Pittsburgh and Erie offices of HBKS®.

“He will be helping the Erie office and to a greater extent the Pittsburgh office, in order to provide service to existing clients with an emphasis on new business development. We know that Zack brings a great work ethic to the position,” Sorce said.

An honors’ graduate of The Behrend College of Penn State University, Zack earned his Bachelor of Science in Finance prior to accepting a position of Financial Advisor with HBKS®, as well as his Series 7, Series 63 and Pennsylvania Life, Accident and Health Insurance licensure. Zack was a recipient of the Beta Gamma Sigma designation for finance majors while at the Behrend Campus of Penn State.

A longtime and avid hockey player and enthusiast, Zack continues to play hockey in the adult leagues in Pittsburgh and is active in various charities in his hometown of Meadville. Zack comes to HBKS® with experience in both the insurance and financial advisory fields having been employed with Nationwide and AXA Financial.

HBKS® warmly welcomes both Ms. Witmer and Mr. Allegretti to the Hill, Barth and King LLC family of financial services firms.

*HBKS Wealth Advisors was established in 2001 when Hill, Barth & King LLC® one of the nation’s most venerable accounting firms, merged with The Sorce Financial Group, an advisory firm headed by brothers Gregory and Christopher Sorce, whose father had been advising clients on financial matters since 1950. The resulting HBK Sorce Financial Group expanded over the next decade into Ohio and Florida as well as throughout western Pennsylvania, adding licensed financial professionals in a wide range of disciplines, and increasing assets under management to more than \$1.2 billion.*

*Today, HBKS advisors in 10 offices operate with that same family-oriented philosophy, working closely with clients, as neighbors and friends, to holistically address their financial conditions, aspirations and goals.*

*To learn more about HBKS®, please visit our website at [www.hbkswalth.com](http://www.hbkswalth.com).*

*Hill, Barth and King LLC® ranks as the 83<sup>rd</sup> largest public accounting firm in the nation. The Firm employs nearly 300 professional and support staff members who serve clients in 12 offices located throughout Pennsylvania, Ohio and Florida.*

*To learn more about Hill, Barth and King LLC® please visit [www.hbkcpa.com](http://www.hbkcpa.com).*

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