

**R. Dean Piccirillo, CFP<sup>®</sup>, CRPS<sup>®</sup>, AIFA<sup>®</sup>**  
**Principal, Senior Financial Advisor**



Dean Piccirillo is a principal, senior financial advisor and client service team director advising HBKS Wealth Advisors clients in the firm's Fort Myers and Sarasota, Florida offices. Additionally, Mr. Piccirillo continues to work with a number of families out of the firm's offices in his hometown of Erie, Pennsylvania. Mr. Piccirillo directs and works closely with several licensed, credentialed professionals on his client service team to help these high net-worth clients and their families manage their assets and organize their finances to meet their long-term objectives.

In addition to Mr. Piccirillo's ongoing consultation work with affluent families, he also directs the HBKS Wealth Advisors Retirement Plan Unit which provides investment consulting services for dozens of corporate, nonprofit and municipal retirement plans. Services offered by this unit include investment advice, monitoring and due diligence for the plan's designated investment alternatives, investment education and counseling for plan participants, fee benchmarking services and a variety of other pension consulting services.

Mr. Piccirillo began his career in financial services in 1989 in Erie, Pennsylvania with American Express Financial Advisors. At American Express, he worked as an advisor in the firm's Advanced Planner Group before joining The Sorce Financial Group, Inc. in 1995. During his tenure with The Sorce Financial Group, Mr. Piccirillo provided personal financial planning and wealth management advice to personal, corporate and institutional clients while also serving in a management capacity with the firm, as chief operating officer and chief compliance officer. Mr. Piccirillo continued in his firm leadership role following the merger of The Sorce Financial Group with the financial services affiliate of Hill, Barth & King LLC. This 2001 merger resulted in the creation of HBK Sorce Financial LLC, the predecessor of the firm now known as HBKS Wealth Advisors LLC. In 2007, Mr. Piccirillo returned his attention to working full-time with personal, corporate and institutional clients.

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Mr. Piccirillo brings a vast range of experience and expertise to his work helping clients grow and preserve their wealth. His more than 25 years of experience as an advisor to affluent families and business owners along with the leadership and supervisory roles he has held with his firm make him uniquely qualified to advise clients on wealth management, retirement planning, estate planning and business succession matters.

Mr. Piccirillo's professional education includes the CERTIFIED FINANCIAL PLANNER<sup>™</sup> designation as well as the Chartered Retirement Plans Specialist<sup>SM</sup> certification. He also holds the Accredited Investment Fiduciary Analyst<sup>™</sup> certification. In addition to these designations and certifications, Mr. Piccirillo maintains life and health insurance licenses in a number of states. He earned his B.S. in Finance and Economics from Slippery Rock University.

Mr. Piccirillo is active in numerous professional and community organizations including as the current, 2015/2016 President of the Greater Fort Myers Chamber of Commerce, the Board Chair for the Southwest Coast Division of the March Dimes, a member of the Advisory Board for the Lee Memorial Health System Foundation's Impact Initiative, a member of the Investment Council for the Lee Memorial Health System, a member of the Cape Coral Community Foundation Investment Committee and many other organizations that he and his wife, Monica support.

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