

Client-Focused, Time-Tested

Pinnacle Consulting Group

A widow inherits a \$1 billion estate. Having no financial experience, she is concerned about how to protect herself from exorbitant taxes and predators. She turns to Orange County-based Pinnacle Consulting Group for guidance.

A husband and wife, worth \$25 million, are dissatisfied with financial advisors who are investing their money in ways contrary to their wishes. Desiring a more customized strategy, they switch to Pinnacle Consulting Group.

Pinnacle Consulting Group clients are the doers, the dreamers, the movers, the shakers, fathers, mothers and business people who will organize their affairs and define their next great journey in life. The firm calls it Pinnacle-Based Planning™ and has been successful for 25 years. Pinnacle believes planning should first be about the client's next best path. Pinnacle clients have completed some planning. Each new family has competent advisors, yet gaps can remain. From asset protection and estate design, to issues of control, taxation and liability, small issues and large issues can prevent anyone's best intentions from playing out.

"We start from a financial planning perspective," says founder Don

- Financial Planning
- Estate Planning
- Investment Planning
- Retirement Planning
- Business Owner Planning
- Charitable Planning



Don Garcia

Garcia. "We have the vision to get to the root of the missing links, and the professional patience to get the problems fixed. Our business model allows us the luxury to sort through the details without rushing to the implementation of financial products. We work diligently behind the scenes to pull together all the layers and all of the players on your behalf. The focus is on taking the plan to the next level, not only to grow but to protect and preserve the client's estate."

"It is amazing what results can be achieved when you follow a good plan."

– Don Garcia, Founder

As an independent firm, Pinnacle Consulting Group offers objective advice. At the same time, Garcia is a member of The Resource Group™, a nationwide network of top financial advisors within Lincoln Financial Advisors. As such, he is able to call upon any number of experienced planners to help address his clients' unique circumstances.

"Many financial advisors want you to believe they have all the answers, but nobody does," Garcia says. "The key is knowing how to access the right information, when you need it."

Having come from humble beginnings, Garcia is as passionate about serving the community as he is about helping his clients. He has served on executive boards for many youth organizations and has helped teach financial literacy to kids. He was appointed by a former U.S. president to the Woodrow Wilson Center for International Scholars, a bipartisan think tank, and he has also served a former California governor in an advisory position. A longtime Newport Beach resident, he currently serves on the board of the California State Workers Compensation Fund, helping to oversee an \$18 billion portfolio.

"Whether you are talking about money or life in general, it is amazing what results can be achieved when you follow a good plan," he says.



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