

# PFS Financial Celebrates New Brand to Highlight Team-Based Wealth Management Approach

*Tampa-based financial planning firm launches new brand that spotlights its well-defined characteristics in a modern aesthetic.*

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has completed a re-brand that reflects the firm's continued growth and underscores their special team-based approach. [Managing Partner J.D. Pellecchia, CFP®, CIMA®, CKA®](#) said of the change: "We are excited to align our outward facing persona to what we have been communicating and delivering internally for our clients. Our PFS GPS Plan™ process dives deeper than merely investment "alphas" and "betas." We help our clients discover Purpose, obtain Freedom, and enjoy Stewardship."



A circa-1920s Tampa craftsman home converted into an office reflects the brand of PFS Financial.

[William L. Mehserle, Jr. AIF®, CFP®, CPWA®, Partner](#), elaborated: "How we practice financial planning and its relation to life is the aggregate of our studies from books like "Purpose Driven Life" by Rick Warren and "Halftime" by Bob Buford – to name just two -- that all point to unshakeable truths about wealth, joy, and life. Through our PFS GPS Plan™ and Stewardship Planning Semesters™ we help our clients answer the questions that surround three all-encompassing aspects of financial life: Purpose, Freedom, and Stewardship."

As part of the new brand, PFS Financial Firm is also launching Channel Markers<sup>SM</sup>. This twice-a-month complimentary newsletter provides information, ideas, and insights to help navigate financial life.

## ABOUT PFS FINANCIAL

PFS Financial Firm, located in Hyde Park, Tampa, Florida, is an independent firm led by J.D. Pellecchia and William L. Mehserle, Jr. Collectively, the firm has over 85 years of experience and has managed over \$1 billion in assets. The firm serves as fiduciaries to hundreds of affluent clients across the country providing comprehensive wealth management and tailored investment strategies, via vertically integrated financial planning solutions. They have been recognized by Florida State University and Forbes.

## DISCLOSURE

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