



NEWS

Contact: William D. Pitney, MBA, CFP®, CeFT®
FocusYOU
650.684.1199
info@FocusYou.com

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MBA, CFP®, CeFT®

Financial Coach Enjoys Thinkfest 2018

William Pitney attends FPA® Retreat in Phoenix

SAN MATEO, CA (April 30, 2018) – FocusYOU is pleased to report that William Pitney, Financial Coach, attended the Financial Planning Association’s Retreat conference (FPA Retreat) in Phoenix, AZ held April 23-26. This year’s theme was built around connections--connecting the past with the present and future.

FPA Retreat is an advanced conference that combines theory with practice in a relaxing, conversational environment with some of the best minds and thought leaders in the financial planning profession. Retreat is designed by and for the profession’s leading experts, most respected planners and future leaders. Many CERTIFIED FINANCIAL PLANNERS™ (CFP®) professionals regard Retreat as “the cutting edge of the art and science of financial planning” because the content is on the leading edge of financial research and techniques. Conference attendees also discuss and debate the most pressing issues that are shaping and reshaping the planning profession.

During this year’s Retreat, Pitney gained a deeper appreciation for the pioneers of the profession of Financial Planning as well as the transformative role of the financial planner. Pitney attended this year’s conference wearing only his business owner’s hat. He stated, “In late 2017, I revisited my purpose for becoming a financial planning. I then made the decision to rebuild FocusYOU into the planning business that I intended to build when I founded the firm in 2011.” Instead of attending sessions designed for continuing education, Pitney chose to attend sessions that focused mostly on being a business owner and business management.

Since attending his first FPA Retreat in 2011, Pitney says that Retreat is a must attend for him. He adds, “When I attend Retreat, I’m sure to walk away with two or three actionable takeaways that enhance the client experience. The professional development is unparalleled and so are the connections with planners from around the globe. Retreat has always changed me from the inside out and makes me a better planner. This year Retreat helped me think about my role as an owner of a financial planning business.”

To learn more about Pitney, visit FocusYou.com

About William Pitney

William Pitney, founder and financial coach of Focus YOU in San Mateo and Santa Rosa, California, has been serving clients as a professional financial planner since 2003. He is a member of the Financial Planning Association, Sudden Money Institute, International Association of Registered Financial Consultants and Peninsula Estate Planning Council. Committed to a higher fiduciary standard of excellence, he has passed a rigorous certification and examination process in order to earn the professional designations of CERTIFIED FINANCIAL PLANNER™ professional and professional and Certified Financial Transitionist®. FocusYOU delivers practical, fully integrated financial strategies and solutions to address the financial planning needs of clients. For more information, visit FocusYou.com.

About Financial Planning Association®

The Financial Planning Association® (FPA®) is the principal professional organization for CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals, educators, financial services providers and students who seek advancement in a growing, dynamic profession. Through a collaborative effort to provide more than 24,000 members with One Connection™ to tools and resources for professional development, business success, advocacy and community, FPA is the indispensable force in the advancement of today's CFP® professional. Learn more about FPA at OneFPA.org.

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