

Profile:



Tod Arbutina | ★★★★★

www.cottrillarbutina.com

My Business Philosophy:

My firm is one of the largest locally owned CPA and financial services firms in Western Pennsylvania, with double digit growth the past several years. With Big Four experience, I provide comprehensive financial services based upon 20 years as a CPA and CFP, and have been profiled in Kiplinger's. My wealth management team of five full-time professionals provides a single source of accounting, auditing, tax and financial planning strategy. We work from an asset under management fee basis.

My Professional Services:

- I provide financial planning services:** Financial, Retirement, Education, Estate, Tax, Charitable
- I provide investment advisory services:** Strategy Development, Written investment policy, Asset allocation, Asset Management, Tax Efficient Strategies
- I provide limited engagement project services:** Financial planning by the hour, Financial tune-ups

My Sources of Financial Expertise:

- I have the following degrees or years of college:** Univ. of Pittsburgh Katz School of Business/MBA
Gettysburg College/ BA
- I have the following years of financial services experience:** 20
- I hold these certifications/designations:** CFP®, CPA
- I am a member of the following associations:** FPA, AICPA, PICPA
- I am a member of a team of professionals**
 - Total number of professionals:** 5
 - Combined years of experience:** 50
 - Combined degrees:** BA, MBA
 - Combined certifications:** CFP®, CPA

My Licensing and Compliance History:

I am Registered Investment Advisor:	No
I am an Investment Advisor Representative:	Yes
I acknowledge I am a fiduciary	Yes
I hold the following security licenses:	65,66,63,7,6
My CRD number is:	3068276
I hold the following insurance licenses:	Life,Annuity,Long-Term Care ,Disability,Health
My Insurance license number:	280626
My compliance record has:	No Disclosures
My criminal record has:	No Disclosures
I agree to provide full disclosure to all investors who hire me through the Registry. The disclosures include: Potential conflicts of interest, compensation, and investment expenses.	

My Minimums & Compensation:

My minimum fee requirement for an initial planning consultation is:	\$1,000
My minimum asset requirement for investment services is:	\$100,000
My method(s) of compensation for my services are as follows:	
Planning services:	Asset-based fee,Fixed fee,Hourly fee,Commissions
Investment Services:	Asset-based fee,Fixed fee,Hourly fee,Commissions
Project Services:	Fixed fee,Hourly fee

My Client Services:

I provide financial services to the following number of clients:	80
I provide financial services to the following amount of assets:	\$ 20,000,000
I supplement meetings with telephone calls on an as needed basis	
I provide services to clients who do not require face-to-face meetings	
I am willing to meet with clients in the following Registry Zones:	
Pennsylvania	
• PA/West - Pittsburgh, Meadville, Johnstown	

My Certification:

<input checked="" type="checkbox"/>	I certify that all of the information in my professional profile is complete, accurate, and current.
Name:	Tod Arbutina
Most Recent Update:	03-26-2006