FOCUSYOU

William D. Pitney

MBA, CFP®, AIF®, RFC®

William D. Pitney has been improving the financial lives of others since 2003, when he began providing fully integrated financial planning advice and services. From day one, he has advocated the consultative approach to planning, which is grounded in years of study and practical experience. William facilitates conversations that might not otherwise take place between spouses, family and business partners. The results: he helps his clients put their financial affairs in good order, safeguard their wealth, and avoid costly mistakes.

William is passionate about helping others. He became a financial planner after witnessing the devastating effects that poor financial counsel had on his mother-in-law following the death of her husband. William entered the industry deeply committed to ensuring others never faced the same fate.

In 2011, William founded Focus YOU to provide an educational approach to developing comprehensive financial strategies which support an individual's most essential life goals. He believes that too often there is a disconnect between what people say they want in life, and the decisions they make with their money to achieve it. By providing clients with more financial knowledge – from the basics through more sophisticated strategies – William strives to empower people to make appropriate decisions and adopt fiscally healthy behaviors to support their goals.

William earned an MBA from The University of Arizona with an emphasis on entrepreneurship, finance and marketing. He received a BA from the University of Kentucky. Committed to a higher fiduciary standard of excellence, he has met the high standards of education, experience and integrity to earn the professional designations of CERTIFIED FINANCIAL PLANNER™ professional and Accredited Investment Fiduciary®. William demonstrates his commitment to on-going professional development by completing a minimum of 40 hours of continue education annually. William has been quoted in media outlets including the Journal of Financial Planning and Black Enterprise Magazine.

William lives in San Mateo County, California with his wife and son. In his free time, William is an avid spectator sports fan and enjoys music, food and traveling. He also enjoys volunteering with organizations focused on children and families.

Areas of Expertise

- Sudden Money / Financial Windfalls
- Comprehensive Financial Planning
- Retirement & Investment Planning
- Risk Management & Insurance Planning
- Estate Planning

Education/Certification

- M.B.A., The University of Arizona
- B.A., University of Kentucky
- Professional Certificate, University of California, Los Angeles
- CERTIFIED FINANCIAL PLANNER™ Professional
- Accredited Investment Fiduciary®
- Registered Financial Consultant
- Series 66 registrations
- CA Insurance License #0D91679

Memberships/Boards

- Financial Planning Association
- Sudden Money Institute
- Center for Fiduciary Studies
- International Association of Registered Financial Consultants
- National Ethics Association
- Palcare