



Professional Profiles

R. Dean Piccirillo, CFP[®], CRPS[®], AIFA[®] Principal, Senior Financial Advisor



Dean is a Principal at HBK Sorce Financial LLC and a Senior Financial Advisor. He works closely with families helping them plan for their long-term financial objectives, manage their financial assets effectively and preserve their wealth for future generations. Dean also leads the HBK Sorce Financial's Retirement Plan Unit working with most of the firm's corporate and institutional clients sponsoring qualified retirement plans.

During his tenure at HBK Sorce, Dean has served as the firm's Chief Operating Officer as well as HBK Sorce's Chief Compliance Officer. In 2009, Dean was named as one of the Top 300 most influential retirement advisors in the U.S. by the 401(k) Wire.

Personally, Dean, his wife, Monica, and their son, Dominick, are fortunate to be able to live and work in two communities, Fort Myers, Florida and their home town of Erie, Pennsylvania. In their spare time, the family enjoys spending time

outdoors and exploring all that both communities have to offer.

Education

- BS Degree in Finance and Economics, Slippery Rock University of Pennsylvania
- CERTIFIED FINANCIAL PLANNER[™] Certification
- CHARTERED RETIREMENT PLANS SPECIALISTSM Certification
- Accredited Investment Fiduciary Analyst[™] Certification
- NASD Series 6, 7, 24, 28 and 63 Licenses
- Life and Health Insurance Licenses

Professional/Civic Associations

- Member, The Financial Planning Association of Southwest Florida
- Board Member, The Greater Fort Myers Chamber of Commerce
- Member, The Greater Fort Myers Chamber of Commerce, Tourism Committee Member
- Chairman, Fort Myers Chamber of Commerce Professional Networking Group
- Member, Cape Coral Chamber of Commerce
- Member, Southwest Florida Regional Technology Partnership
- Steering Committee Member and Co-Founder, Social Media Club of Southwest Florida

Volunteer Activity

- Board Member, Lamb of God Church, Estero, Florida
- Member, The Greater Fort Myers Chamber of Commerce ABC's Auction for Education Planning Committee
- Member, Fort Myers Development Council, Lee Memorial Health System Foundation
- Member, Erie Playhouse Advisory Committee
- Volunteer, March of Dimes, Florida Chapter
- Volunteer, Interfaith Caregivers of South Lee, Inc.

Wright House • 235 West 6th Street • Erie, PA 16507 | 8010 Summerlin Lakes Drive • Fort Myers, FL 33907

Phone: (814) 459-1116 • 1-800-823-0617

Fax: (814) 459-6499

Phone: (239) 482-5522 • 1-866-479-5522

Fax: (239) 482-7772

dpiccirillo@hbksorce.com • www.hbksorce.com • www.deanpiccirillo.com