

## About Tom Pietrack, CFP®

### Education & Experience

Tom is a CFP® practitioner and member of the Financial Planning Association's Phoenix Chapter. He is the co-founder of and Director of Financial Planning and Portfolio Manager at Coherent Financial Advisers, LLC.

Tom is a seasoned investment industry professional. His experience includes: Director of Financial Planning and Portfolio Manager at Wealth Management International, Ltd., Portfolio Consultant and Financial Consultant managing a \$300M book of business at Schwab, owner of an American Express Financial Advisors practice. His expertise includes financial planning, portfolio management, advanced tax and estate planning strategies.

Tom's big picture strategic thinking combined with his attention to detail about client's specific goals builds long term relationships with individuals, families, and business owners. Tom believes clients do not merely need more information, but financial wisdom anchored in experience and education tailored to each individual's unique goals, perspective and life ambition.

Tom grew up in Pittsburgh PA, and is an avid football fan. Tom is an advocate for animal welfare and enjoys hiking with his two rescue dogs, Twinkie and Miley. Tom is married and his children are millennials. He is passionate about helping this generation increase their financial knowledge for their long-term financial well-being.



### Certifications, Memberships & Degrees

- CERTIFIED FINANCIAL PLANNER™ practitioner
- Financial Planning Association member, Phoenix Chapter
- Life/Health/Disability/Long Term Care Insurance
- DDS, Case Western Reserve University School of Dentistry, Cleveland OH
- General Practice Residency, Ohio State University and VA Medical Hospital, Columbus OH
- BA, Case Western Reserve University, Cleveland OH

For a more detailed resume, please visit [Tom's LinkedIn page](#).

### Professional Reports

- [CFP Certification](#)
- [NASAA Investment Adviser Public Disclosure \(IAPD\)](#)

For a convenient link to each report, please visit our website at [www.coherentfa.com/about](http://www.coherentfa.com/about).