



Investment Planners, Inc. welcomes the partnership of David Bartosiak and Kathy Weaver

October 6 2015 2:28 PM



ALTON - Investment Planners, Inc., announced today that **David Bartosiak** and **Kathy Weaver** have formed a partnership that will be located in the Alton, IL office of **C.J. Schlosser & Company, LLC**. “This team has what it takes to exceed client

expectations, and we are excited for this partnership and growth.” said **David Koshinski**, President of **Investment Planners, Inc.** “These advisors have the mindset, background, and experience to be the perfect asset to the Riverbend area.”

Bartosiak and Weaver have a wealth of knowledge and experience in tax and accounting services, investments and retirement planning as well as estate planning and insurance. The team will also include Todd Van Hoy as a Financial Advisor, Jamie Ruyle as a Registered Assistant and Kari Weaver as Administrative Assistant.

Bartosiak graduated from SIUE in 1987 with a BSA in Accountancy and went on to pass his CPA Exam. He is the Director of the Taxation Division at C.J. Schlosser & Company, L.L.C. and has been with the firm since 1987 becoming a partner in 1997. He became registered as a Financial Advisor in 2007.

“I believe that that combination of our team’s knowledge and experience in accounting, taxation, and investment management will provide our clients with a truly unique opportunity for all of their financial needs.” said Bartosiak. “I’m very excited about this new venture.”

Weaver has been in the investment and securities industry since 1996. She became a financial advisor in 2002 and has been growing her business since then. Weaver currently holds her life, health, and accident insurance licenses as well. Prior to joining this team, she had an independent office with Investment Planners, located in Godfrey.

“Partnering a CPA firm and an investment firm is the perfect combination. Our clients will have the advantage of a team of professionals on their side working toward their goals.” said Kathy Weaver. “I’m looking forward to working with David and his team as we grow our partnership.”

The office will have a ribbon cutting on October 14th at 4:00 at 233 E. Center Drive in Alton. This is open to the public. We invite all to join us for this special event!

To contact them, call 618-466-0100 or email dbartosiak@investment-planners.com or kweaver@investment-planners.com.

About Us: Investment Planners, Inc. is a broker/dealer and is affiliated with an independent SEC Registered Investment Adviser, IPI Wealth Management based in Decatur, IL. The Firm partners with high-caliber financial advisors who are looking to expand their capabilities in meeting their client's needs. IPI Wealth Management is one of the fastest growing wealth management firms in the United States and was named in 2008 as a top 10 Fastest Growing Firms by Financial Advisor Magazine. For more information, visit us online at www.investment-planners.com

