

Laidlaw Wealth Management Acquires Naples Wealth Planning

Laidlaw Wealth Management is pleased to announce its acquisition and partnership with Naples Wealth Planning.

NEW YORK, NY, USA, October 19, 2020 /EINPresswire.com/ -- [Laidlaw Wealth Management](#) is pleased to announce its acquisition and partnership with Naples Wealth Planning a well-recognized and respected RIA based in Naples, Florida.

The agreement will add four new offices in Naples, Tampa, Stuart, and

Miami to Laidlaw's existing Florida location in Boca Raton. In addition, this launches a new platform at Laidlaw to service and expand the 1099 model for advisors. This is an area Richard Calhoun, CEO of Laidlaw Wealth Management, knows well as he was instrumental in the growth of the Wells Fargo Advisors Financial Network from 245 offices to 642 offices, as Managing Director of Growth and Innovation.

Naples Wealth Planning will continue to operate under their valued brand and will be led by Brian Bruneau. Upon completion of the transaction, Mr. Bruneau will join the Investment Committee for Laidlaw Wealth Management. Prior to the close of the transaction Brian was Chief Operating Officer of both Naples Wealth Management and the parent company Capital Wealth Planning LLC. Brian brings an extensive Fortune 100 executive management background with over 23 years in the financial services industry, along with a unique entrepreneurial skillset developing and building businesses. He held Senior Management roles at Met Life, Hartford Private Capital Management, Bank of America/Columbia Management and Zurich Financial Services.

Richard Calhoun stated, "we are very excited about this opportunity to expand our presence in Florida and further serve that community with the great team at NWP, both firms have experienced rapid organic growth and have a very strong cultural alignment." "The combination of these two high quality platforms enhances our value proposition for our clients and advisors." "In addition, having a presence in Miami is key to the growth of our International Business, where



we have a unique offering, existing client base and a strong desire to grow.” Brian Bruneau added, “there is very little overlap since both companies work with the same custodian and technology stack, meaning the transition will be faster with very little disruption to our clients and advisors.” “Laidlaw’s 178-year history of innovation and partnership culture with a true client centric focus is what made them the best fit for NWP.” “The breath of resources and platform offering at Laidlaw will help us better serve our clients and continue to evolve as a premier wealth management firm.”

About Naples Wealth Planning

Naples Wealth Planning has a strong financial planning heritage providing a focused Private Client Investment Management Team. NWP has created a true customer-centric HNW private client organization geared toward providing clients with the most appropriate financial planning and investment solutions for their stage in life – not just selling them investment products. Naples Wealth Planning is based in Naples, FL with additional offices in Stuart, Tampa and Miami.

About Laidlaw and Company

Laidlaw & Co. is headquartered in New York City with additional offices in London, San Francisco, CA, Greenwich, CT, Boca Raton, FL, Toms River, NJ and Melville, NY. Laidlaw and Company (UK) Ltd. was founded in 1842 as one of the first Investment Banking firms on Wall Street and continues as a full-service investment bank, brokerage and wealth management firm offering personalized investment advice for high net worth individuals and skillful execution to private and public institutions. For further information contact Richard Calhoun rcalhoun@laidlawltd.com

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