

Seven Seventy2 Capital Advisors named as Five Star Professionals

BETHESDA, MARYLAND, UNITED STATES, July 10, 2023 /EINPresswire.com/ -- Seventy2 Capital Wealth Management, a client-centered, independent wealth management practice, announced today that seven of their advisors have been named as [2023 Five Star Professional Wealth Managers](#): Troy Elser, Mike Levitsky, Don Dearie, Steve Otten, John Benjamin, John Pagano, and Amy Roberts.



Seventy2 Capital is excited to have 7 team members rank as Five Star Professionals. I believe this honor recognizes their dedication to wealth management and care for clients; we couldn't be prouder!"

Paul Carlson, CEO, Seventy2 Capital

"Seventy2 Capital is excited to have seven team members rank as Five Star Professionals in 2023," said Paul Carlson, CEO of the practice. "I believe this honor recognizes their dedication to wealth management and care for their clients; we couldn't be prouder!"

Troy Elser leads the practice's office in Hunt Valley as a Partner and has over 20 years of experience as a Financial Advisor. He strives to deliver a superior client experience and help them embrace their financial future with confidence. He believes that by having a plan, staying the course, and surrounding oneself with genuine, trustworthy

professionals, you will exceed your life goals.

Mike Levitsky is a Partner and Director of Investment Strategy at Seventy2 Capital, as well as a founding member. He leads the practice's Investment Committee and manages Seventy2 Capital's discretionary investment strategies. Mike works with clients and advisors to build custom solutions to mitigate risk. He also oversees the practice's internal account operations, expansion modeling, and economics.

As a Senior Vice President, Don Dearie works to help clients achieve their desired financial outcomes with the highest probability of success. Client education is the driving force behind Don's approach to wealth management. He offers strategic, personalized investment advice and guidance as well as customized financial strategies.

Steve Otten is a Senior Vice President at Seventy2 Capital, where he focuses on assisting clients plan and pursue a predictable retirement income designed to support their desired lifestyle. He draws on over fifteen years of industry experience, as well as professional certifications like the

CFP™ and CRPC® designation.

John Benjamin is an Assistant Vice President and CFP™ professional. He delivers comprehensive wealth management strategies, including retirement planning, investment portfolio recommendations, tax-efficient strategies, and liability management to clients.

John Pagano is an Assistant Vice President with Seventy2 Capital. He specializes in portfolio construction with an emphasis on retirees, and helps clients work towards their financial goals through customized advice for retirement planning, estate planning, and wealth preservation.

As an Assistant Vice President, Amy Roberts advises clients on retirement planning strategies, estate planning strategies, charitable giving, family finances, and education savings. She has a focus on helping women achieve their financial goals and works to educate women's groups on the topics of investment management and personal finances.

About Seventy2 Capital

Seventy2 Capital is a full-service, independent wealth management practice committed to supporting individuals, families, and business owners to achieve their financial goals. We are passionate about the work we do for our clients. We form a deep understanding of our client's goals and values and then develop and implement customized strategies that fit those objectives.

About Wells Fargo Advisors Financial Network

For more than 20 years, Wells Fargo Advisors Financial Network (WFAFN), the independent brokerage arm of Wells Fargo & Company, has simplified independence by partnering with successful financial advisors and fostering a mutual passion for doing what's right for clients.

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC, (WFAFN) Member SIPC. Seventy2 Capital Wealth Management is a separate entity from WFAFN.

About Five Star Professional Wealth Managers

This award was issued on 01/01/23 by Five Star Professional (FSP) for the time period 04/18/22 through 10/21/22. Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. The award is based on 10 objective criteria. Eligibility criteria - required: 1. Credentialed as a registered investment adviser (RIA) or a registered investment adviser representative; 2. Actively licensed as a RIA or as a principal of a registered investment adviser firm for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by FSP, the wealth manager has not; A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three

settled or pending complaints filed against them and/or a total of five settled, pending, dismissed or denied complaints with any regulatory authority or FSP's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through FSP's consumer complaint process; feedback may not be representative of any one client's experience; C. Individually contributed to a financial settlement of a customer complaint; D. Filed for personal bankruptcy within the past 11 years; E. Been terminated from a financial services firm within the past 11 years; F. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients. Evaluation criteria - considered: 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. FSP does not evaluate quality of services provided to clients. The award is not indicative of the wealth manager's future performance. Wealth managers may or may not use discretion in their practice and therefore may not manage their clients' assets. The inclusion of a wealth manager on the Five Star Wealth Manager list should not be construed as an endorsement of the wealth manager by FSP or this publication. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by FSP in the future. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria. 2,126 Baltimore-area wealth managers were considered for the award; 256 (12% of candidates) were named 2023 Five Star Wealth Managers. Visit www.fivestarpromotional.com.

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Katy Jones-Powe
Seventy2 Capital Wealth Management
+1 3012982230

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