

Paramus-Based Financial Advisor Recognized for Excellence and Growth

James T. Cassa, CPA, PPC named Advisor to Watch

PARAMUS, NJ, UNITED STATES, July 27, 2023 /EINPresswire.com/ -- James T. Cassa, CPA, PPC, Founder and President of Cassa [Wealth Management](#), has been named to Advisor Hub's second annual "Advisors to Watch" list. The list highlights financial advisors from across the country who have demonstrated professional excellence and practice growth.

“

“It is an honor to be recognized among the top advisors in the country,” said Jim Cassa. “This recognition reflects our team’s dedication in helping our clients navigate challenging times.”

Jim Cassa

Located in Paramus, NJ, Cassa Wealth Management provides highly personalized [financial planning](#) and investment management services to individuals, families, and business owners. The firm prides itself on gaining a deep understanding of each client’s unique needs and financial goals to develop customized plans and investment strategies tailored to their objectives.

“It is an honor to be recognized among the top advisors in the country,” said Jim Cassa. “This recognition reflects our team’s dedication to providing personalized financial guidance and helping our clients navigate challenging times”.

With over 25 years of experience in financial services, Jim Cassa founded Cassa Wealth Management to offer private clients a more tailored approach to wealth management. The firm’s expertise spans Investment Management, [Retirement Planning](#), Estate Planning strategies, Tax Planning, and Intergenerational Wealth Transfer. Cassa Wealth Management maintains close working relationships with their clients’ CPA’s, Attorneys, and other professional advisors to ensure comprehensive and coordinated financial strategies.

“The advisors on this list represent the future of the wealth management industry,” said Tony Sirianni, president of AdvisorHub. “It’s a measure of who is doing their job and servicing their clients and their community. These are advisors who grew their business through the uncertainty of 2020, which is a testament to their professionalism and the value they provide to their clients”.

The “Advisors to Watch” list was compiled based on a range of quantitative and qualitative

factors, including revenue growth, industry credentials, client satisfaction, and community involvement.

Lastly, it's important to note that participation in this ranking is free, and AdvisorHub receives no compensation from the participating advisors.

Jim will be receiving his award at the AdvisorHub Advisors to Watch Summit at the prestigious University Club in New York City on November 15, 2023.

About Cassa Wealth Management:

Cassa Wealth Management is a Private Wealth Management firm located in Paramus, NJ. The firm provides customized financial planning and investment management services to help clients achieve their financial goals. Cassa Wealth Management serves individuals, families, business owners, and professionals. Cassa Wealth Management upholds the Fiduciary Standard, which requires putting client's interests first. For more information, visit <https://www.cassawealthmgmt.com>.

James T. Cassa, CPA, PPC
Cassa Wealth Management, P.C.

+ + +1 201-355-1788

james.cassa@lpl.com

Visit us on social media:

[Facebook](#)

[LinkedIn](#)

[YouTube](#)



2023
AdvisorHub
ADVISORS TO WATCH
FAST GROWING



#189
JAMES T. CASSA
CPA, PPC
Cassa Wealth Management, P.C.
Paramus, NJ
GROWTH: 80.40

Our Methodology
We received nominations from over 374 firms. Nominees were required to have a minimum of seven years experience, \$100m minimum AUM, and a clean regulatory record. Advisors were ranked on the size and makeup of their practice, year-over-year growth, and professionalism and character. Participation in this ranking is open to any firm or advisor and there are no fees for participation.

AdvisorHub Advisors to Watch

This press release can be viewed online at: <https://www.einpresswire.com/article/646525001>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2023 Newsmatics Inc. All Right Reserved.