Seventy2 Capital expands into Bluffton, SC and Westport, CT with the addition of Christopher Calabrese, Sr. MD, and team

BETHESDA, MARYLAND, UNITED STATES, May 1, 2024 /EINPresswire.com/ -- Seventy2 Capital Wealth Management, a client-centered, independent wealth management practice headquartered in the Washington DC – Baltimore region, announced today that they are opening an office in Bluffton, South Carolina and expanding their presence in Westport, Connecticut with the addition of Christopher Calabrese - Senior Managing Director, Mark Sicilia - Executive Vice President & Financial Advisor, and Francis Spina - Senior Vice President & Financial Advisor.

> Their prioritization of client relationships, desire for growth, and creative client solutions will be strong assets to our practice, and we are excited to expand our team in Westport and Bluffton."
>
> *Paul Carlson, CEO, Seventy2 Capital Wealth Management*

"We are honored that Chris Calabrese and his team have chosen Seventy2 Capital in their move to independence," said Paul Carlson, CEO and Co-Founder of Seventy2 Capital. "Their prioritization of client relationships, desire for successful growth, and creative client solutions will be strong assets to our practice, and we are excited to expand our team in Westport and open in Bluffton."

Christopher joins Seventy2 Capital with 28 years of experience in the wealth management industry, serving at Wells Fargo Advisors, Prudential Securities Incorporated, and Salomon Smith Barney. Mark gained 37 years of experience working for Janney Montgomery Scott, A.G. Edwards, Merrill Lynch, and Wells Fargo Advisors. Francis served as a financial advisor and in managerial positions at Wells Fargo Advisors for nearly twenty years before joining Seventy2 Capital, most recently serving as Assistant Market Leader and Senior Vice President. Additionally, he is a CERTIFIED FINANCIAL PLANNER® professional.

When asked about his new role, Christopher stated "I am excited for the opportunity to take greater control over my book of business, yet still benefit from the resources offered by Seventy2 Capital and Wells Fargo Advisors Financial Network. I fully believe that this move will benefit my clients, and I look forward to continuing to build and preserve their assets from my new practice."

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. We have been recognized as one of the 2022 Forbes Top Wealth Management Teams - High Net Worth in the United States and 2023 Barron's Top 100 Private Wealth Management Teams. Visit Seventy2Capital.com.

2022 Forbes Top Wealth Management Teams: Awarded November 2022; Data compiled by SHOOK Research LLC based on the time period from 3/31/21 - 3/31/22 (Source: Forbes.com). The Forbes Top Wealth Management Teams rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

2023 Barron's Top 100 Private Wealth Management Teams: Awarded April 2023; Data Compiled by Barron's based on the time period from Jan. 2022 - Dec. 2022 (Source: Barrons.com). The Barron's Top 100 Private Wealth Management Teams are evaluated on a range of factors for the Financial Advisor and their team, who specialize in serving individuals and families. Factors included in the ratings include their previous year's size and shape, the regulatory records and credentials of their members, and the resources they have at their disposal to serve their client bases. Self-completed questionnaire was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

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 is right for clients.

Wells Fargo Wealth & Investment Management (WIM) is a division within Wells Fargo & Company. WIM provides financial products and services through various bank and brokerage affiliates of Wells Fargo & Company.

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC, Member SIPC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Seventy2 Capital Wealth Management is a separate entity from Wells Fargo Advisors Financial Network.

Katy Jones-Powe
Seventy2 Capital Wealth Management
+1 301-298-2230
email us here
