



Seventy2 Capital Wealth Management Surpasses \$10 Billion in Assets Under Management

BETHESDA, MD, UNITED STATES, November 25, 2024 /EINPresswire.com/ -- Seventy2 Capital Wealth Management, a client-centered, independent wealth management practice headquartered in the Washington DC – Baltimore region, announced that their practice has surpassed \$10 billion in assets under management (AUM) as of November 18, 2024.



We view this milestone as validation that our commitment to our clients and team members is working."

Paul Carlson, CEO & Co-Founder, Seventy2 Capital Wealth Management

"We view this milestone as validation that our commitment to our clients and team members is working," said Paul Carlson, CEO and Co-Founder of Seventy2 Capital. "We created Seventy2 Capital to offer the benefits of independence with a deep bench of thoughtful, talented team members. I am proud to see that this model, paired with our "can do, will do" attitude, has enabled great service and optimized client outcomes."

Paul Carlson and Thomas Fautrel co-founded Seventy2

Capital in December 2016 after leaving Morgan Stanley to go independent within Wells Fargo Advisors Financial Network. After their first year in business, the eight-person team had just over \$2 million in revenue and \$274 million in AUM with one office in Bethesda, MD. Through organic growth and recruiting additional advisors to join the team, Seventy2 Capital has grown rapidly, surpassing \$1 billion in AUM in their first four years, \$3 billion in six years in business, and \$5 billion earlier this year. Today, the practice is made up of 64 advisors and 45 staff members in 11 offices spanning the East Coast, with an additional 27 team members committed to joining next year.

About Seventy2 Capital Wealth Management

Seventy2 Capital is a client-focused, growth-oriented wealth management practice dedicated to achieving client goals. We offer the benefits of independence with a deep bench of thoughtful, talented team members and the backing of Wells Fargo Advisors Financial Network. We believe this model, paired with our "can do, will do" attitude, enables great service and optimizes client outcomes. In recognition of these efforts, we have been recognized as one of the 2024 Forbes Top Wealth Management Teams High Net Worth and 2024 Barron's Top 250 Private Wealth

Management Teams. [Visit Seventy2Capital.com](https://www.seventy2capital.com) to learn more.

2024 Forbes Top Wealth Management Teams High Net Worth: Awarded November 2024; Data compiled by SHOOK Research LLC based on the time period from 3/31/23 - 3/31/24 (Source: Forbes.com). The Forbes Top Wealth Management Teams High Net Worth 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. High Net Worth designates advisors whose account sizes are typically under \$10mm, though may have accounts with higher amounts.

2024 Barron's Top 250 Private Wealth Management Teams: Awarded May 2024; Data Compiled by Barron's based on the time period from Jan. 2023 – Dec. 2023 (Source: Barrons.com). The Barron's Top 250 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, the independent contractor business model of Wells Fargo Wealth & Investment Management (WIM), has offered financial advisors more control, flexibility, and growth around business ownership as well as support from one of the nation's largest financial institutions. 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 (WFAFN), a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Any other referenced entity is a separate entity from WFAFN.

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