



11 Seventy2 Capital Team Members Listed as 2025 Five Star Wealth Managers

BETHESDA, MD, UNITED STATES, August 8, 2025 /EINPresswire.com/ -- Seventy2 Capital Wealth Management, a client-centered, independent wealth management practice headquartered in the Washington DC – Baltimore region, announced today that eleven of their advisors have been named as 2025 Five Star Professional Wealth Managers:



This honor recognizes their dedication to their role as a trusted professional to guide clients in their financial decision-making."

Paul Carlson, CEO, Seventy2 Capital Wealth Management

- Troy Elser – Senior Managing Director, Hunt Valley
- Linda Whittington – Managing Director, Tysons
- Mike Levitsky – Managing Director, Investment Strategy
- Michael Hartman – Executive Director & Financial Advisor
- Kyle Hublitz – Executive Director & Financial Advisor
- Scott Stephen - Executive Director & Financial Advisor
- James Brockett – Executive Vice President & Financial Advisor
- Don Dearie – Executive Vice President & Financial Advisor
- David Holdsworth – Executive Vice President & Financial Advisor
- Steve Otten – Executive Vice President & Financial Advisor
- John Pagano - Assistant Vice President & Financial Advisor

"Seventy2 Capital is proud to have eleven team members rank as Five Star Wealth Managers in 2025," said Paul Carlson, CEO of the practice. "This honor recognizes their dedication to their role as a trusted professional to guide clients in their financial decision-making."

According to [fivestarprofessional.com](https://www.fivestarprofessional.com), The Five Star Wealth Manager is awarded to advisors that go above and beyond in order to satisfy their clients and provide the best financial services possible to each individual. Advisors must meet a vast list of criteria including assets under management, client retention rate, quality of service, and commitment to their clients' needs. The advisors that meet the criteria undergo a thorough regulatory and compliance review, and are then given the recognition as a Five Star Wealth Manager.

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. Seventy2 Capital has been recognized as a Barron's Top 250 Private Wealth Management Team in 2025. For more please visit www.seventy2capital.com.

2025 Barron's Top 250 Private Wealth Management Teams: Awarded May 2025; Data Compiled by Barron's based on the time period from Jan. 2024 - Dec. 2024 (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 (FiNet), 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. www.wfafinet.com

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 01/01/2025 by Five Star Professional (FSP) for the time period 04/10/2024 through 10/31/2024. Fee paid for use of marketing materials. 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. 2389 Baltimore-area wealth managers were considered for the award; 254 (11 % of candidates) were named 2025 Five Star Wealth Managers.

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. Visit www.fivestarprofessional.com.

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