# James Shea joins Seventy2 Capital as Senior Vice President & Financial Advisor, Senior Portfolio Manager

BETHESDA, MD, UNITED STATES, September 22, 2025 /EINPresswire.com/ -- Seventy2 Capital Wealth Management, a client-centered, independent wealth management practice headquartered in the Washington DC – Baltimore region, announced today that James Shea has joined their practice as a Senior Vice President & Financial Advisor, Senior Portfolio Manager.

> We are thrilled to welcome James into our Red Bank office! His drive to help clients reach their financial goals through personalized solutions makes him a great fit for our team."
>
> *Mark Stoll, Managing Director, Seventy2 Capital*

Mark Stoll, Seventy2 Capital's Managing Director, Business Growth & Development said, "We are thrilled to welcome James into our Red Bank office! His expertise and drive to help clients reach their financial goals through personalized solutions makes him a great fit for our team, and we look forward to working with him."

James Shea brings nearly three decades of financial advisory experience, having built his career at leading firms including Morgan Stanley, Oppenheimer & Co, UBS, Bank of America, PNC Investments, Porter, LeVay & Rose, and Wells Fargo Advisors. Over the course of his career, James has developed a reputation for delivering disciplined investment management and comprehensive wealth strategies tailored to high-net-worth individuals, families, entrepreneurs, and business owners. His approach is holistic and personalized, with an emphasis on scalable investment processes and customized allocations. He works with clients across all aspects of wealth management, including investment and estate planning strategies, tax strategies, philanthropy, risk management, and liquidity planning, while collaborating closely with attorneys, CPAs, and family offices. James' goal is to simplify complexity and help clients preserve, grow, and transfer wealth effectively.

When asked what excites him about being at Seventy2 Capital, James said, "I'm excited to be joining Seventy2 Capital and the opportunity to grow my practice with more independence, scale, and flexibility. My goals include expanding my client base, leveraging the firm's resources, and continuing to deliver exceptional advice to families and entrepreneurs."

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 2024. For more information 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.

Katy Jones-Powe
Seventy2 Capital Wealth Management
+1 301-298-2242
email us here

---

This press release can be viewed online at: https://www.einpresswire.com/article/851372202

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.
© 1995-2025 Newsmatics Inc. All Right Reserved.