

# Dream Big Wealth Strategies Joins Cornerstone Planning Group

*Worcester-based advisor Julianne Hertel moves her \$60 million practice to Cornerstone's RIA, expanding the firm's private wealth presence in Massachusetts.*

FAIRFIELD, NJ, UNITED STATES, May 18, 2026 /EINPresswire.com/ -- [Cornerstone Planning Group](#)

“

Joining Cornerstone gives Dream Big Wealth Strategies the support and flexibility to grow while staying rooted in relationships, community, and our clients' goals.”

*Julianne Hertel, founder of Dream Big Wealth Strategies*

announced today that Julianne Hertel, founder of Worcester-based [Dream Big Wealth Strategies, LLC](#), has joined the firm's registered investment advisor platform. Hertel brings an established advisory practice with approximately \$60 million in assets under management.

Hertel joins Cornerstone after building her practice at New York Life. She will continue operating under the Dream Big Wealth Strategies brand while gaining access to Cornerstone's advisor support infrastructure, including operations, compliance, technology, investment resources,

and practice management support.

“Dream Big Wealth Strategies has always been rooted in relationships, community, and helping people build lives that reflect what matters most to them,” said Julianne Hertel, founder of Dream Big Wealth Strategies. “Joining Cornerstone gives me the support and flexibility to continue growing the practice in a way that honors those values, while staying deeply connected to my clients and the Worcester community.”

The move expands Cornerstone's private wealth presence in Massachusetts and contributes to the firm surpassing \$1 billion in assets under management on the private wealth side.

“Julianne was the perfect match for CPG,” said Jay Tarno, Chief Operating Officer of Cornerstone Planning Group. “She embodies what we look for in an advisor: a strong commitment to client impact, growth, and community. We are proud to partner with her as she enters this next chapter.”

For Hertel, the transition creates more flexibility to grow Dream Big Wealth Strategies while maintaining her own brand identity and client relationships. She will continue serving clients

from Worcester, Mass., supported by Cornerstone's Fairfield, N.J.-based RIA infrastructure.

Cornerstone Planning Group works with independent advisors seeking operational, compliance, investment, technology, and business support as they grow their practices. The firm's model is designed to help advisors maintain ownership of their client relationships while accessing the infrastructure of a larger advisory firm.

To learn more about Cornerstone Planning Group, visit [cornerstoneplanninggroup.com](https://cornerstoneplanninggroup.com).

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Welcome to  
Cornerstone

Dream  
Big  
Wealth  
Strategies

Welcoming  
**Julianne Hertel**  
to Cornerstone Planning  
Group as an affiliated  
financial advisor

 Cornerstone  
PLANNING GROUP

Welcoming Julianne Hertel to  
Cornerstone Planning Group as an  
affiliated financial advisor

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