Jeff Sharpe and Scott Tansley join Seventy2 Capital, expanding in Westport and opening a new office in Cheshire, CT

BETHESDA, MD, UNITED STATES, August 31, 2026 /EINPresswire.com/ -- Seventy2 Capital Wealth Management, a client-centered, independent wealth management practice headquartered in the Washington, DC –Baltimore region, announced today that it has added Executive Director & Financial Advisor Jeff Sharpe, who will be joining the Westport office, and Executive Vice President & Financial Advisor Scott Tansley, who will open a new office in Cheshire, Connecticut.

> We are thrilled to add Jeff and Scott to the team and expand our presence in Connecticut."
>
> *Paul Carlson, CEO, Seventy2 Capital Wealth Management*

"We are thrilled to add Jeff and Scott to the team and expand our presence in Connecticut with a new office in Cheshire. Jeff and Scott bring over 45 years of experience in financial services between them, having worked with large practices such as Merrill Lynch and Wells Fargo Advisors. We are very excited to work with them!" said CEO and Co-Founder of Seventy2 Capital, Paul Carlson.

Jeff starts his approach by understanding each client's goals, values, and priorities. He believes in building long-term relationships based on trust, transparency, and personalized advice. Jeff combines customized investment management, tax-aware strategies*, retirement planning strategies, and risk management to help to preserve and grow their wealth while navigating life's financial transitions. As a PIM® Portfolio Manager, Jeff takes an active approach to portfolio construction, with a particular emphasis on customized fixed income solutions, municipal bond strategies, market-linked structured products, and options strategies tailored to each client's unique objectives. He frequently incorporates options strategies for risk mitigation and income generation when appropriate for a client's goals and risk tolerance. These strategies are integrated into a broader portfolio management process designed to provide clients with greater flexibility, tax efficiency, and enhanced risk-adjusted outcomes.

As an Executive Vice President at Seventy2 Capital, Scott strives to maximize any incremental benefit he can and make a difference in the margins for his clients. As an advisor who tends to work mostly with retirees and blue-collar workers, everything comes back to being as efficient as possible.

When asked what excites them about joining Seventy2 Capital, Jeff said, “Joining Seventy2 Capital represents an exciting new chapter in my career. I look forward to combining my years of advisory experience with the firm’s independent platform, technology, and resources to continue delivering personalized, high-quality advice and helping clients achieve their long-term financial goals.

Joining Jeff in Westport is Ana Backa, Senior Wealth Planning Associate. Ana partners with financial advisors to deliver a high-touch wealth management experience. She combines exceptional client relationship management, investment analytics, and strategic business support. Ana serves as a primary point of contact for clients and prospects, fostering trusted relationships through proactive communication, personalized service, and timely resolution of inquiries. Her responsibilities include conducting investment performance analysis, monitoring portfolio and benchmark results, identifying business development opportunities through market research, and developing compelling presentations and proposals for client and prospect meetings.

In Cheshire, Zack Green will join Scott as a Senior Registered Client Service Associate. Zack takes a proactive, client-focused approach to his role. He anticipates needs and resolves issues efficiently to support both advisors and clients. Zack prioritizes accuracy, responsiveness, and strong communication while helping to ensure compliance and operational excellence. He also leverages his experience to guide colleagues and contribute to a collaborative, high-performing team environment.

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**The PIM program is not designed for excessively traded or inactive accounts and is not appropriate for all investors. Please carefully review the advisory disclosure documents for a full description of our services. The minimum account size for this program is $50,000.

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 2026 For more please visit www.seventy2capital.com.

2026 Barron’s Top 250 Private Wealth Management Teams: Awarded May 2026; Data Compiled by Barron’s based on the time period from Jan. 2025 – Dec. 2025 (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.

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For more than 25 years, Wells Fargo Advisors Financial Network, the independent contractor business model of 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.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.

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