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Connecticut Wealth Management Promotes Kailee Ostroski, Megan Trask, and Emily Wood to Partner

FARMINGTON, Conn.— (Jan. 3, 2021) —Kailee Ostroski, CFP®, Megan Trask, CFP®, and Emily Wood, CFP® have each been promoted to Partner at Connecticut Wealth Management, LLC (CTWM), a registered investment advisor committed to creating genuine partnerships with clients and providing unbiased financial planning and asset management.

"Each of these exceptional team members are skilled in their individual areas of expertise and have had a tremendous impact on the growth of our firm over the recent years," said President & CEO of CTWM, Kevin C. Leahy. "Each of them exemplifies our firm's core values every single day, both professionally and in the community."

Kailee M. Ostroski joined the CTWM team in 2016 and is expanding her role in the firm's day-to-day operations. She has been instrumental in the firm's accelerated growth through the development and implementation of processes across the entire firm. Further, Ostroski will work with the leadership team to establish goals that align with the firm's vision, while also working to ensure there is consistent and clear communication throughout the organization.

Megan Trask joined the CTWM team in 2017 and oversees the firm's Investment Committee. She is a driver of the development and implementation of solid investment strategies and builds meaningful relationships with her clients. Trask primarily works with business owners and executives and manages the largest portion of the firm's client assets.

Emily R. Wood joined the CTWM team in 2018. Wood oversees the Financial Planning department, and her role is growing to include oversight of existing and emerging client services. Wood remains committed to delivering an exceptional wealth management experience to the firm's clients and finding innovative strategies to turn client aspirations into financial realities.

Respectively, the new partners are highly committed to charitable outreach, a key part of CTWM's culture.

Ostroski showcases her charitable commitment by taking it to the stage. She is the Founder and President of the Backyard Theater Ensemble, a collaboration of artists devoting their time, experience and resources to produce theater that inspires, challenges, and entertains both performers and audiences.

With strong community ties, Trask sits on the Investment Committee for The Village for Families &

Children, where she helps develop investment policy and due diligence for the organization's endowment. Megan is also the advisor to the Vice President of Academic Excellence of the Kappa Kappa Gamma sorority at the University of Massachusetts Amherst. She assists in developing the 100-person chapter's scholastics expectations and requirements and visits quarterly to ensure adherence.

Beyond the walls of CTWM, Wood is a Board Member of the Connecticut Association of Human Services. The organization has recognized Wood as a Volunteer of the Year for "going above and beyond" in her work as a pro-bono financial coach and financial literacy workshop facilitator. Wood also volunteers for Savvy Ladies, providing financial education and resources for women.

The three newly appointed partners look forward to leading within their respective areas of focus, driving growth for CTWM, and most importantly, helping many more clients fulfill their life goals and aspirations.

About Connecticut Wealth Management, LLC

Connecticut Wealth Management, LLC is a registered investment advisor that believes in creating genuine partnerships, building trust and understanding with clients in order to provide unbiased financial planning and asset management to individuals across Connecticut and nationwide. Connecticut Wealth Management takes pride in employing an independent business model that aligns our interests with those of our clients, and engaging in a collaborative, team approach to create empowering wealth management strategies and solutions. For more information about Connecticut Wealth Management, LLC., visit CTWealthMgmt.com.