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MEDIA CONTACT
Caroline Lee
Desk: 860.679.9734
Mobile: 630.926.4537
Carolinel@mintz-hoke.com

Kathleen Christensen Promoted to Partner of Connecticut Wealth Management

FARMINGTON, Connecticut—January 21, 2020—Kathleen M. Christensen has been promoted to Partner at Connecticut Wealth Management, LLC (CTWM), a registered investment advisor committed to creating genuine partnerships with clients in order to provide unbiased financial planning and asset management.

"With this promotion we recognize Kathy's unwavering commitment to our clients, our team and our community" said CEO of CTWM, Kevin Leahy. "As a leader she champions professional development and charitable outreach, two important parts of the Connecticut Wealth Management culture."

Christensen was previously a Director at CTWM and recently earned the designation of Certified Divorce Financial Analyst. She finds it rewarding to assist clients as they chart and navigate their financial futures. In addition, she oversees the firm's Charitable Outreach Committee and serves on the Investment and Financial Planning Committees.

"Ensuring that our clients receive exceptional service and have financial plans tailored to their life goals is our number one priority," said Christensen, "I'm happy to be a partner of a firm that holds true to its mission and core values."

Christensen brings more than 25 years of experience in finance, tax planning and accounting to CTWM clients. She provides wealth management services to high net worth clients with complex financial affairs. Prior to joining CTWM, Christensen was a financial advisor at Filomeno Wealth Management, LLC. She also advanced through numerous leadership roles at Cigna and spent four years in public accounting at Deloitte and Touche. She has been recognized as a Five Star Wealth Manager® by Crescendo Business Services (2015 – 2019) and contributes as a thought leader for local and national news. Christensen graduated from the University of Hartford with a Master of Business Administration degree with a concentration in Taxation; and she earned her Bachelor of Science in Accounting from Fairfield University. She is a Certified Public Accountant and a Personal Financial Specialist and maintains active membership in the American Institute of Certified Public Accountants and the Connecticut Society of Certified Public Accountants.

Extremely committed to charitable outreach, Christensen is a member of the Bridge Family Center Board of Directors, chairs the Development Committee and serves on the Bridge Charity Ball Committee. She is also a member of the Connecticut Women's Council and the Hartford Estate and Business Planning Council. She resides in West Hartford with her husband, Curt, and enjoys running, yoga and spending time with her three grown children.

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 www.CTWealthMgmt.com.