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FOR IMMEDIATE RELEASE

CONNECTICUT WEALTH MANAGEMENT CELEBRATES 10th ANNIVERSARY

FARMINGTON, Connecticut—October 1, 2020—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 is celebrating a milestone ten years in business this year.

Since opening its doors, a decade ago, CTWM's business has evolved from its modest beginnings to a growing organization committed to helping their clients turn life's aspirations into financial realities. CTWM has grown exponentially since their inception, starting with $185 million under management and now managing $2 billion in assets today. CTWM began with seven employees and has now reached 35. That deep bench helps to provide clients with the exceptional service CTWM is known for. What speaks real volumes, though, is the 99% retention rate with an average client to advisor ratio below 30, while the industry standard is well above 100.

However, the truly important piece of what CTWM has accomplished throughout the years are not statistics, but the real stories of real people and their families that they have helped retire successfully, put kids through college, buy their vacation home on the beach, or transition a business from one generation to the next. These success stories embody what CTWM set out to do ten years ago, establish trusting relationships to help people live their best life.

"Here at CTWM, we are aligning the goals of our employees with those of our clients to ensure we provide exceptional service, which is exactly what we set out to do ten years ago," said Denis M. Horrigan, CFP®, Partner and Co-founder of CTWM. "The most rewarding part of what we do is making a difference in someone else's life. Our profession has had the incentives for advisors wrong forever. CTWM’s model starts with the goal of taking care of clients, not growing the company. Hire the best people, incentivize them to do the right thing and the result is an awesome and unique client experience. The growth stems from that.”

The firm's origins began on October 1, 2010, when Kevin C. Leahy and Denis M. Horrigan saw an unmet need in the industry and decided to provide an innovative approach to wealth management. The goal was simply to serve clients in an open, honest environment with a client-first approach and exceptional service. The other intent of this new firm was to break the mold and create a team-oriented culture rather than the typical sales culture found in most wealth management firms throughout the industry.

"Our ability to thrive for a decade now is reflected in the commitment our employees have to our clients," said Kevin C. Leahy, President and CEO of CTWM. "The selflessness with which our team operates for the best interest of our clients, as well as the wellbeing of the organization, is really extraordinary. Our employees have a unique bond, and the more we care about one another, the better the organization gets, and the better work we do for our clients. That comradery is just tremendous and is greatly appreciated."

By serving their clients and the community so well, CTWM has been honored in several ways throughout the past ten years. The organization has been named one of *Connecticut's Best Places to Work* for four years running, placing #1 on the list in 2018. CTWM has also been named to Financial Times Top 300 RIAS in 2015, 2016 and 2020. The team has also been recognized, as Kevin received *Hartford Business Journal*'s CEO of the Year in 2019, Jarrett F. Solomon, CFP,® CIMA® and Partner at CTWM received *Hartford Business Journal*'s 40 Under Forty in 2014, and Connecticut Magazine's 40 Under Forty in 2015 and most recently, Megan Trask, CFP®, Managing Advisor & Director of Investment Committee, received *Hartford Business Journal*'s 40 Under Forty in 2020.

CTWM would like to thank all their clients, the local community and area professionals for supporting them throughout these ten years of service. CTWM looks forward to serving them well into the future.

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 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.