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FOR IMMEDIATE RELEASE

Connecticut Wealth Management, LLC completes merger with Capital Strategies, Inc.

Combined team leverages shared value of building genuine client relationships

FARMINGTON, Connecticut—September 18, 2019—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, announced today they have successfully merged Bloomfield-based Capital Strategies into the Connecticut Wealth Management team. CTWM officially welcomed the new team members following the completion of the merger on June 1 for an undisclosed amount. The entire Capital Strategies team is excited to continue providing clients with exceptional service as new CTWM team members.

"Clients are our first priority," said President and Chief Executive Officer at CTWM, Kevin Leahy. "We're incredibly excited to have deepened our team, most especially with respect to risk management and executive benefits. We're always looking for ways to better the client experience and our new team of very bright and experienced colleagues are already helping us do just that."

Adding five new team members brings the total to 25, helping CTWM grow strategically and maintain a focus on what matters most—the client experience. CTWM focuses on providing exceptional levels of customer service and personalized attention. This unparalleled approach to relationship building has fueled their success and will always remain core to the CTWM client experience.

"We have long admired each other's teams and client-first approach," said Co-Founder of Capital Strategies and new Partner at CTWM Claudia J. Jacques-Soto. "Our clients will continue to have access to tremendous expertise, resources and professionalism but from a deeper bench now that we have come together as one."

Adding to her perspective, Co-Founder of Capital Strategies and new Partner at CTWM, Bichop J. Nawrot said, "We would like to thank our clients for the trust they have placed in us, both over the years, and as we move forward with Connecticut Wealth Management. We look forward to ongoing client introductions to the new team and invite them to share the benefits of our deeper resources."

<u>About Connecticut Wealth Management, LLC</u>

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.

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