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## *FOR IMMEDIATE RELEASE*

# Connecticut Wealth Management hires Dan Ballou

*Ballou serves as the firm's newest financial advisor*

**FARMINGTON, Connecticut—June 3, 2019—**Connecticut Wealth Management, LLC. (CTWM), a registered investment advisor offering financial planning and asset management to individuals across Connecticut and nationwide, announced today that Dan Ballou, a CERTIFIED FINANCIAL PLANNER™ (CFP®), has joined the firm as a financial advisor.

"Dan has experienced early success in his career, and we are excited about his future contributions to Connecticut Wealth Management," said President and Chief Executive Officer of CTWM, Kevin c. Leahy. "He takes great pride in effectively communicating complex financial planning topics and works well in our collaborative environment."

Dan Ballou will work with the CTWM team with creating financial plans and implementing portfolio strategies. He is also responsible for supporting 401(k) seminars and presentations—where his strong ability to translate complex terminology into digestible content will be particularly helpful for CTWM clients.

Originally entering the financial industry through marketing, Ballou continued to seek professional development opportunities including the completion of his CERTIFIED FINANCIAL PLANNER™ (CFP®) designation. In his five-year tenure at Andover, Massachusetts-based Putnam Retail Management, he held positions in marketing and wealth management, while earning top marks in peer evaluations. He graduated with a Bachelor of Business Administration from the University of Miami, Coral Gables, Florida.

"For the next phase of my career, I was seeking an opportunity that would enable me to collaborate and bring innovative ideas for consideration," said Financial Advisor, Dan Ballou. "Connecticut Wealth Management is a great example of taking a different approach to better serve clients. I admire the work that has been done so far to challenge existing frameworks and choose a path that better meets the needs of our growing clientele. When our motivations are in line with client success, everyone wins, and I'm happy to have found a place that shares those values."

**About Connecticut Wealth Management, LLC**
Connecticut Wealth Management, LLC is a registered investment advisor offering financial planning and asset management to individuals across Connecticut and nationwide. At Connecticut Wealth Management, we take pride in our independent business model that aligns our interests with those of our clients. Our primary goal is to provide thorough, unbiased financial planning that leads to suitable strategies and solutions for our clients. Our firm employs a collaborative team approach to wealth management, and our advisors form genuine partnerships with our clients built on trust and understanding. For more information about Connecticut Wealth Management, LLC, please visit our website www.CTWealthMgmt.com.

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