



**FINANCIAL  
PLANNING  
ASSOCIATION**  
CONNECTICUT



## Guide to 2024-25 Sponsors



### Advisors Asset Management

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| Gold   | <a href="https://www.aamlive.com/publicsite/aamhome">https://www.aamlive.com/publicsite/aamhome</a> |
| Derek Januario<br>Regional Vice President – ETFs | <a href="mailto:derek.januario@aamlive.com">derek.januario@aamlive.com</a><br>(860) 933-1959        |
| Ken Dougherty<br>Regional Vice President         | <a href="mailto:ken.dougherty@aamlive.com">ken.dougherty@aamlive.com</a><br>(475) 282-5293          |
| Rich Jaeger<br>Regional Vice President – UITs    | <a href="mailto:rich.jaeger@aamlive.com">rich.jaeger@aamlive.com</a><br>(516) 727-0782              |

AAM has been a trusted resource for financial advisors and broker-dealers for over 40 years. The firm offers access to alternatives, exchange-traded funds, the fixed-income markets, managed accounts, mutual funds, structured products, and unit investment trusts. The ultimate parent of AAM is Sun Life Assurance Company of Canada. AAM is part of SLC Management, Sun Life’s businesses in institutional alternatives and traditional asset management. For more information, visit [www.aamlive.com](http://www.aamlive.com). As of December 31, 2023, AAM’s brokerage and advised businesses represent \$41.4 billion in assets: \$3.9 billion under management in proprietary separately managed accounts, mutual funds and ETFs; \$5.4 billion under supervision in UITs; and \$32.1 billion under administration without management.



### Allianz Life

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| Silver   | <a href="https://www.allianzlife.com/for-financial-professionals/advisory-solutions">https://www.allianzlife.com/for-financial-professionals/advisory-solutions</a> |
| Babak Abedi<br>Regional Vice President   Advisory Consultant     | <a href="mailto:babak.abedi@allianzlife.com">babak.abedi@allianzlife.com</a><br>(410) 683-8849  |
| Bruce Ravech<br>Senior Vice President   District Director        | <a href="mailto:bruce.ravech@allianzlife.com">bruce.ravech@allianzlife.com</a><br>(617) 459-9650  |
| Mike DiDonato<br>Regional Vice President   Retirement Consultant | <a href="mailto:mike.didonato@allianzlife.com">mike.didonato@allianzlife.com</a><br>(203) 241-2840  |

We help our advisors create more efficient portfolios by leveraging our risk management expertise through non-commissionable and commissionable annuity offerings.



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## Allspring Global Investments

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| Silver                                       | <a href="https://www.allspringglobal.com/">https://www.allspringglobal.com/</a>                            |
| Ryan Luczynski<br>Regional Director          | <a href="mailto:rluczynski@allspring-global.com">rluczynski@allspring-global.com</a><br>(857) 208-8247     |
| Marc Zampanti<br>Associate Regional Director | <a href="mailto:marc.zampanti@allspringglobal.com">marc.zampanti@allspringglobal.com</a><br>(617) 675-3445 |

Allspring Global Investments is a leading asset management firm with more than \$465 billion in assets under management, offices around the world, and investment teams supported by more than 460 investment professionals. We are a platform that goes beyond for clients, providing a broad range of investment solutions to help our diverse client base meet their investment objectives. Allspring leverages decades of experience and core investment roots to inspire a new era of investing that pursues both financial returns and positive outcomes, with a singular focus on asset management and a mission to elevate investing to be worth more.



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## Baron Capital

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| Silver  | <a href="https://www.baronfunds.com/">https://www.baronfunds.com/</a><br><a href="https://www.baronfunds.com/about#section-our-history">https://www.baronfunds.com/about#section-our-history</a> |
| Robin Thureau<br>VP, Regional Director          | <a href="mailto:rthurau@baronfunds.com">rthurau@baronfunds.com</a><br>(212) 583-2083   |
| Bryan Comandini, AAMS®<br>Investment Specialist | <a href="mailto:bcomandini@baronfunds.com">bcomandini@baronfunds.com</a><br>(917) 933-0128   |

Baron Capital Group, Inc. is a premier asset management firm focused on delivering growth equity investment solutions. Founded in 1982, we started managing assets in 1983 and have since become known for our long-term, fundamental, active approach to growth investing.

Our investment approach is the same across all our strategies: we employ fundamental research to identify and invest in companies with open-ended growth opportunities, durable competitive advantages, and strong management, at attractive valuations relative to our estimates of intrinsic value.

Our long-term approach enables us to think about a company as business owners and to see and capitalize upon the longer-term opportunities.

We believe the combination of our long-term investment horizon and our exhaustive research differentiates us from our peers and creates a competitive advantage for our Firm.



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## Calamos Investments

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| Silver  | <a href="http://www.calamos.com">www.calamos.com</a>                                     |
| Paul Giovannello, CIMA®<br>VP, Investment Consultant – CT/NY    | <a href="mailto:pgiovannello@calamos.com">pgiovannello@calamos.com</a><br>(203) 399-6058 |
| Jared Palish, CFA, CIMA®<br>VP, ETF Specialist – Eastern Region | <a href="mailto:jpalish@calamos.com">jpalish@calamos.com</a><br>(201) 627-7728           |

At Calamos, we are helping Investment Professionals engage and manage risk via liquid alternatives, private credit, ESG, US small cap EM equity and active ETFs. We are partnering with advisors in areas of their allocations that require active management.

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**CAPITAL  
GROUP**<sup>®</sup>

**AMERICAN  
FUNDS**<sup>®</sup>

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### Capital Group | American Funds

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|---|--|
| Platinum  | <a href="http://www.capitalgroup.com">www.capitalgroup.com</a>                                 |
| Damian Carroll, CFA <sup>®</sup> , CIMA <sup>®</sup> , CPWA <sup>®</sup><br>Relationship Manager – RIA/BT                                       | <a href="mailto:damian_carroll@capgroup.com">damian_carroll@capgroup.com</a><br>(877) 421-1328 |
| Andrew “Andy” Laskowski<br>Senior Vice President  | <a href="mailto:andy.laskowski@capgroup.com">andy.laskowski@capgroup.com</a><br>(888) 421-0122 |
| Peter Olsen, CIMA <sup>®</sup><br>Senior Vice President & Wealth Management Consultant  | <a href="mailto:peter.olsen@capgroup.com">peter.olsen@capgroup.com</a><br>(877) 421-5327       |
| Matt Bloemer, CRPS <sup>®</sup> , PPC <sup>®</sup><br>Regional Vice President & Divisional Retirement Plan Counselor – New England & Upstate NY | <a href="mailto:matt.bloemer@capgroup.com">matt.bloemer@capgroup.com</a><br>(732) 228-0702     |

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Since 1931, American Funds, part of Capital Group, has helped investors pursue long-term investment success. Our consistent approach — in combination with The Capital System<sup>SM</sup> — has resulted in a consistent long-term track record. Our investment process, The Capital System, combines individual accountability with teamwork. Each fund is divided into portions that are managed independently by investment professionals with diverse backgrounds, ages and investment approaches. An extensive global research effort is the backbone of our system.



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### Charles Schwab

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|---------------------------------------|--|
| Silver                                | <a href="https://advisorservices.schwab.com/">https://advisorservices.schwab.com/</a>    |
| George Zydell<br>Relationship Manager | <a href="mailto:george.zydell@schwab.com">george.zydell@schwab.com</a><br>(617) 960-5227 |

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For over 30 years, Schwab has been a leader in supporting independent Registered Investment Advisors (“RIAs”). We are committed to the success of firms of all sizes, regardless of background, assets under management, or business complexity. Together, we can help you take your business further. Get started by discovering the breadth of services you can tap into when you choose Schwab as your custodian.



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### Cohen & Steers

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| Silver  | <a href="http://www.cohenandsteers.com">www.cohenandsteers.com</a>                           |
| Chris Boland, AIF<br>Vice President   Regional Wealth Management Consultant | <a href="mailto:cboland@cohenandsteers.com">cboland@cohenandsteers.com</a><br>(203) 873-8488 |

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Cohen & Steers is a leading global investment manager specializing in real assets and alternative income, including real estate, preferred securities, infrastructure, resource equities, commodities, as well as multi-strategy solutions. Founded in 1986, the firm is headquartered in New York City, with offices in London, Dublin, Hong Kong, Tokyo and Singapore.

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## Czepiga Daly Pope & Perri

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| Gold   | <a href="http://www.ctseniorlaw.com">www.ctseniorlaw.com</a>                           |
| Brendan Daly<br>Principal   Managing Partner     | <a href="mailto:brendan@ctseniorlaw.com">brendan@ctseniorlaw.com</a><br>(860) 236-7673 |
| Colleen Masse<br>Partner                         | <a href="mailto:colleen@ctseniorlaw.com">colleen@ctseniorlaw.com</a><br>(860) 236-7673 |
| Erin Duques<br>Partner                           | <a href="mailto:eduques@ctseniorlaw.com">eduques@ctseniorlaw.com</a><br>(860) 236-7673 |
| Beth Dance<br>Marketing Director                 | <a href="mailto:bdance@ctseniorlaw.com">bdance@ctseniorlaw.com</a><br>(860) 236-7673   |
| Nathan Grivers<br>Community Outreach Coordinator | <a href="mailto:nathan@ctseniorlaw.com">nathan@ctseniorlaw.com</a><br>(860) 236-7673   |

Families change. And when change comes, you want to make sure you and your family's future will be protected. You want to know that you did all you could do.

Czepiga Daly Pope & Perri will help you do just that. For seniors, families, caregivers, individuals with special needs, and the LGBTQ+ community, our Connecticut estate planning, elder law and special needs attorneys will help you reduce the stress that accompanies the financial and medical care challenges that come with change.



## DPL Financial Partners

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| Silver  | <a href="http://www.dplfp.com">www.dplfp.com</a>                         |
| Patrick "PJ" Perry<br>Regional VP, Member Success | <a href="mailto:pperry@dplfp.com">pperry@dplfp.com</a><br>(502) 546-6701 |

DPL Financial Partners helps RIAs strategically leverage commission-free insurance and annuity solutions to deliver better client outcomes and grow their practices. Working with the nation's leading carriers, DPL has assembled a powerful line-up of products that deliver greater client value and portfolio performance.



## Eaton Vance

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| BronzePlus                               | <a href="http://www.eatonvance.com">www.eatonvance.com</a>   |
| Jack Bolton<br>Wealth Advisor Consultant | <a href="mailto:jack.bolton@eatonvanceus.com">jack.bolton@eatonvanceus.com</a><br>(857) 205-7143   |
| Lauren Stahl<br>Internal Consultant      | <a href="mailto:lauren.stahl@eatonvanceus.com">lauren.stahl@eatonvanceus.com</a><br>(617) 672-8184 |

Eaton Vance provides financial advisors with the investment strategies and resources to solve their clients' most advanced investing challenges across a range of asset classes in public and private markets. Our investment solutions include a broad range of alternatives, high-conviction active strategies, customization strategies, ESG expertise and tax-management solutions. Eaton Vance is part of Morgan Stanley Investment Management, the asset management division of Morgan Stanley. Learn more at [www.eatonvance.com](http://www.eatonvance.com).

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TAKING THE MYSTERY OUT OF MEDICARE

### **Emerald Medicare**

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| Silver                                  | <a href="http://www.emeraldmedicare.com">www.emeraldmedicare.com</a>                           |
| Mark Brownstein<br>Director of Medicare | <a href="mailto:mark@emeraldmedicare.com">mark@emeraldmedicare.com</a><br>(845) 358-1220       |
| Michele Horton<br>Executive Assistant   | <a href="mailto:michele@emeraldmedicare.com">michele@emeraldmedicare.com</a><br>(845) 358-1220 |

#### SIMPLIFY THE PROCESS WITH EMERALD MEDICARE!

Are you overwhelmed? Receiving too much mail from many different insurance carriers all boasting about being the best choice for your client? At Emerald Medicare, we understand how confusing this decision can be. We will help you and your clients move forward with your Medicare choices with confidence.

Our aim is to help individuals find and enroll in a Medicare plan that best suits their needs and budget all at NO COST to you! Our goal is to help clients understand Medicare and find the best solution that fits both their health and budget needs each and every year.

Mark Brownstein is an independent local, regional and dedicated independent Insurance Agent as well as a Certified Senior Advisor® serving the New York, New Jersey, Connecticut and 20 other states nationally.



Managed by  
FENIMORE ASSET MANAGEMENT

### **Fenimore Asset Management, Inc. | FAM Funds**

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| Silver   | <a href="https://fenimoreasset.com/">https://fenimoreasset.com/</a><br><a href="https://fenimoreasset.com/solutions/mutual-funds/">https://fenimoreasset.com/solutions/mutual-funds/</a> |
| William "Billy" Wise<br>Director               | <a href="mailto:wwise@fenimoreasset.com">wwise@fenimoreasset.com</a><br>(518) 823-1215   |
| Hunter Frayne<br>Investment Research Associate |  |

Fenimore Asset Management is an independent investment advisor driven by in-house research and a value philosophy. As a Trusted Investment Partner managing FAM Funds, we provide high-quality strategies built for the long-term. Solutions for financial planners and advisors include: FAM Value Fund – a core stock strategy for long-term appreciation with a conservative approach; FAM Dividend Focus Fund – structured in mid-cap growing dividend positions for total return; and FAM Small Cap Fund – a concentrated, alpha generating strategy for diversification.



### **Harbor Capital Advisors**

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| BronzePlus  | <a href="https://www.harborcapital.com/">https://www.harborcapital.com/</a>                              |
| Bryan Griffin, CFP®<br>Regional Investment Consultant – New England | <a href="mailto:bryan.griffin@harborcapital.com">bryan.griffin@harborcapital.com</a><br>(508) 745-1084   |
| Rob Alessandro<br>Senior Business Development Analyst               | <a href="mailto:rob.alessandro@harborcapital.com">rob.alessandro@harborcapital.com</a><br>(617) 603-6308 |

Harbor Capital Advisors focuses on identifying and partnering with alpha-generating institutional investment teams, with proven track records, who specialize in various asset classes and investment styles. We provide ETF and MF access to these managers' flagship strategies.

## HARTFORDFUNDS

Our benchmark is the investor.®

### Hartford Funds

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| BronzePlus                                   | <a href="http://www.hartfordfunds.com">www.hartfordfunds.com</a>                     |
| Jane Flanigan                                | <a href="mailto:jane.flanigan@hartfordfunds.com">jane.flanigan@hartfordfunds.com</a> |
| Regional Vice President – Advisor Consultant | (914) 907-4370   |

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At Hartford Funds, we think differently about money management. Because as much as fund companies and asset managers would like our business to be all about the numbers – it's not.

Our product line-up includes more than 60 mutual funds and ETFs in a variety of styles and asset classes. Our mutual funds are primarily sub-advised by [Wellington Management Company LLP](#) or [Schroder Investment Management North America Inc.](#), two institutional managers with comprehensive global investment capabilities.

No matter the asset class or type of fund, Hartford Funds will always strive to meet or exceed traditional industry benchmarks, but through human-centric investing, we strive to also raise the bar on performance and make it mean more than numbers alone.

Because at Hartford Funds...The investor is our benchmark.



### Kyber Security

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|------------------------------|--|
| BronzePlus                   | <a href="http://www.kybersecure.com">www.kybersecure.com</a>               |
| Michael Giuffrida            | <a href="mailto:mgiuffrida@kybersecure.com">mgiuffrida@kybersecure.com</a> |
| President                    | (203) 333-4444 x113  |
| Sedney Bin                   | <a href="mailto:sbin@kybersecure.com">sbin@kybersecure.com</a>             |
| Security Solutions Executive | (203) 333-4444 x102  |

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Kyber Security has created a SecurityFirst™ methodology for delivering high-touch secure support services. Kyber is not your everyday IT provider or managed services provider ("MSP"). We are devoted to delivering a quality and responsive user support experience and keeping your business safe from ever-increasing cyber threats. Having been in the technology industry for 35+ years, Kyber Security was created out of loyalty, responsibility, and necessity to protect and support those that need it the most, small- and medium-sized organizations.



### LoCorr Funds

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|                             |  |
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| Silver                      | <a href="http://www.locorrfunds.com">www.locorrfunds.com</a>       |
| Gabriel "Gabe" Dutra, CIMA® | <a href="mailto:gdutra@locorrfunds.com">gdutra@locorrfunds.com</a> |
| Regional Vice President     | (617) 835-4953   |

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LoCorr Funds seeks to offer low correlating investments that can reduce risk and increase returns in portfolios. As the name "LoCorr" implies, low correlation is a key tenet in portfolio risk management.

LoCorr is committed to providing liquid investment alternatives that will produce returns independently of those generated by traditional asset classes, such as stocks and bonds.



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## Nationwide Investment Management Group

Silver <https://nationwidefinancial.com/products/investments/mutual-funds>

Joseph Dinaso [joseph.dinaso@nationwide.com](mailto:joseph.dinaso@nationwide.com)  
Institutional Investment Consultant (312) 442-2134

Nationwide Investment Management Group (“IMG”) is dedicated to serving the needs of institutional investors and enhancing client outcomes. Our philosophy is based on the idea that isolating consistent alpha generation requires discipline and an understanding of the drivers of return. Our process focuses on selecting subadvisers and investment solutions capable of generating returns across market environments.

As a diversified insurance and financial-services company with \$270.2 billion in assets, Nationwide is a proud member of Fortune 100. We’ve effectively navigated market turbulence for nearly 100 years, since 1926; we were the first insurer to offer mutual funds, in 1954. Nationwide IMG manages \$72.1 billion through 20-plus subadvisers and 50-plus investments offerings.



## PGIM Investments

Silver [www.pgim.com/investments/](http://www.pgim.com/investments/)

Harry Rakovski [harry.rakovski@pgim.com](mailto:harry.rakovski@pgim.com)  
Director – RIA, Family Office & Consultant Relations, Northeast (973) 289-7997

Johnston Dickinson [johnston.dickinson@pgim.com](mailto:johnston.dickinson@pgim.com)  
Senior Investment Specialist – RIA & Consultant Relations (973) 397-0473

We help fiduciaries and fee-based advisors create more efficient portfolios by leveraging our risk management expertise through non-commissionable annuities and buffered ETF offerings.



## State Street Global Advisors SPDR ETFs

Silver [www.spdrs.com](http://www.spdrs.com)

Timothy “Tim” Brock, CFP®, CIMA® [timothy\\_brock@ssga.com](mailto:timothy_brock@ssga.com)  
Vice President | RIA Regional Consultant (203) 916-3933

Thomas Nolan [thomas\\_nolan@ssga.com](mailto:thomas_nolan@ssga.com)  
Vice President | Regional Consultant (617) 784-5084

State Street SPDR ETFs: Creator of the World’s First ETFs

**Innovation with Purpose:** For more than 25 years, we have been creating some of the world’s most innovative and ground-breaking ETFs. And always with good reason: We built the first US-listed ETF to give the markets a better way to invest. We were involved with launching the first physical gold-backed ETF.

**Crafted by Experts:** Take a look under the hood of any of our ETFs, and you’ll find some of the world’s finest investing capabilities. Each is designed, built, and managed by an experienced team that includes some of the same managers who forged the ETF industry.

**Built in Partnership:** We build partnerships based on what needs to be done. Listening to our clients always comes first. This lets us either create a bespoke investment, or better direct advisors and institutions to an appropriate answer. And, beyond that, we can guide our clients every step of the way to use ETFs more effectively, helping them get the most out of every opportunity.

ETFs managed by State Street Global Advisors have the oldest inception dates within the US, Hong Kong, Australia, and Singapore. State Street Global Advisors launched the first ETF in the US on January 22, 1993; launched the first ETF in Hong Kong on November 11, 1999; launched the first ETF in Australia on August 24, 2001; and launched the first ETF in Singapore on April 11, 2002.

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# T.RowePrice

## T. Rowe Price Investment Services

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| Silver   | <a href="https://www.troweprice.com/financial-intermediary/us/en/home.html">https://www.troweprice.com/financial-intermediary/us/en/home.html</a> |
| Mary Louise "ML" Dixon   | <a href="mailto:ml.dixon@troweprice.com">ml.dixon@troweprice.com</a>  |
| Vice President, US Intermediaries   Regional Investment Consultant | (203) 609-1931  |



## Underwriters Brokerage Services

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| Gold                          | <a href="http://www.ubsnet.com">www.ubsnet.com</a>  |
|                               | <a href="http://www.ubsnet.com/wp-content/uploads/Stefan-Cherneski-Bio-2021.pdf">http://www.ubsnet.com/wp-content/uploads/Stefan-Cherneski-Bio-2021.pdf</a> |
| Stefan Cherneski, CFP®        | <a href="mailto:scherneski@ubsnet.com">scherneski@ubsnet.com</a>  |
| Insurance Planning Specialist | (860) 874-2750  |
| Sean J. Link, JD              | <a href="mailto:sean.link@ubsnet.com">sean.link@ubsnet.com</a>  |
| Estate Planning Specialist    | (412) 201-7950  |

Underwriters Brokerage Service has focused exclusively on serving the needs of Financial Planning Professionals. That focus has helped us grow to become a leading independent planning firm for Estate, Business and Insurance Planning Business.

We partner with a wide range of Financial Planning Professionals including Financial Planners, Estate Planners, RIA's, Financial Advisors, Registered Representatives, Insurance Professionals, Property Casualty Agents and more.

Support for Insurance Planning opportunities includes access to a dedicated Insurance Planning Specialist, Estate Planning Specialist, Medical Director, Case Design Team, Case Management, and full Policy Service department.

Our services are designed with the highest level of respect for your role. We communicate on every aspect of the solutions we recommend and are fully transparent in our process. As an Independent Partner, we focus on the clients' best interest, not a particular company's best interest.

The real benefit is the knowledge, accessibility, and confidence you gain in serving your clients' risk management and insurance needs, completely and efficiently.

We welcome the opportunity to be your trusted Insurance Planning Partner.



## Vanguard Financial Advisor Services

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| Silver                | <a href="https://advisors.vanguard.com/advisors-home">https://advisors.vanguard.com/advisors-home</a> |
| Jeremy Gehrke, CIMA®  | <a href="mailto:jeremy_gerhke@vanguard.com">jeremy_gerhke@vanguard.com</a>                            |
| Sales Executive – RIA | (203) 997-7545  |

Founded in 1975, Vanguard is one of the world's most respected investment management companies. The firm offers investments; advice and retirement services; and insights to individuals, institutions, and financial professionals. Based in Malvern, Pennsylvania, Vanguard has offices worldwide and manages more than \$9.0 trillion\* on behalf of more than 50 million clients\*. Vanguard operates under a unique, investor-owned\*\* structure and adheres to a simple purpose: To take a stand for all investors, to treat them fairly, and to give them the best chance for investment success.

\* As of February 29, 2024.

\*\* Investor-owned means that fund shareholders own the funds, which in turn own Vanguard.



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## Voya Investment Management

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|--------------------------|---|
| Gold                     | <a href="https://investments.voya.com">https://investments.voya.com</a> |
| Thomas "Tom" Bueti       | <a href="mailto:thomas.bueti@voya.com">thomas.bueti@voya.com</a>        |
| Senior Regional Director | (914) 224-2968  |

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Voya Investment Management is the asset management business of Voya Financial (NYSE: VOYA), overseeing \$318 billion\* in assets for institutions, financial intermediaries and individual investors. Voya Investment Management is one of the 50 largest asset managers globally.\*\* Drawing on a 50-year investing heritage and the expertise of over 300 investment professionals, Voya IM strategies span public and private fixed income, equities, multi-asset solutions and alternatives. We have cultivated a culture committed to understanding and anticipating clients' needs, producing superior investment performance, and seeking to embed diversity, equity and inclusion in everything we do.

\* As of 12/31/23. Voya Investment Management assets are calculated on a market value basis and include proprietary insurance general account assets of \$33 billion.

\*\* *Pension & Investments*, "The Largest Money Managers," 2023 Survey, based on assets as of 12/31/22.



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## Wiggin and Dana

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| Gold          | <a href="https://www.wiggin.com/">https://www.wiggin.com/</a><br><a href="https://www.wiggin.com/services/private-client-services/">https://www.wiggin.com/services/private-client-services/</a> |
| Michael Clear | <a href="mailto:mclear@wiggin.com">mclear@wiggin.com</a>   |
| Partner       | (203) 363-7675   |
| Erin Nicholls | <a href="mailto:enicholls@wiggin.com">enicholls@wiggin.com</a>   |
| Partner       | (203) 498-4319   |

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Wiggin and Dana is a full-service firm with approximately 165 lawyers spanning eight offices, including multiple cities in Connecticut, as well as New York, Philadelphia, Washington, D.C., and Palm Beach. The firm has served as trusted legal adviser to wealthy individuals, family offices, entrepreneurs, private and public companies, hospitals, universities and other non-profit institutions for over 80 years. Most importantly, we are focused on the issues our clients care about and strive to help them find ways to create value and manage risk.

While we provide a broad array of private client services, here are some of the specific areas in which we can serve you: • Business Succession Planning, • Charitable Planning, • Estate Planning, • Family and Closely-Held Business Planning, • Family Office Representation, • International Private Client Services, • Prenuptial and Postnuptial Agreement Planning, • Probate Litigation, and • Trusts and Estate Administration Services.

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