'The Best of Both Worlds'

Seventy2 Capital Wealth Management/Wells Fargo Advisors Financial Network

After nearly a decade in the wire-house world, Thomas Fautrel, CRPC® and Paul Carlson, CRPC® were convinced there was a better way to serve their clients. "The more we talked about it, the more certain we became that our clients would be better served in a private-office model versus a branch office of a large firm," Fautrel says.

After exploring a number of options, they concluded that joining Wells Fargo was the best move by far for what they had in mind. Seventy2 Capital Wealth Management/Wells Fargo Advisors Financial Network opened for business on December 1, 2016.

Clients of Seventy2 Capital Wealth Management benefit from the collective expertise and insights of an exceptional team of financial professionals. Partners Thomas Fautrel and Paul Carlson are both Chartered Retirement Planning Counselors who were recognized as Five-Star Wealth Managers in 2015 and 2016. Carlson, a former delegate to the Maryland House of Representatives, has a master's degree in public policy from Harvard and brings to bear wide-ranging knowledge of economic and public policy. Fautrel previously ran top-ranked training programs at two wire houses. Rounding out the team are Joy Lomibao, Vice President; Mike Levitsky, Assistant Vice President; Sean Kirby-Smith, Assistant Vice President; John Benjamin, Assistant Vice President; Antonio Price, Client Associate; James Brockett, Associate; Michael Jorgenson, Associate

What's in a Name?

The name Seventy2 Capital Wealth Management refers both to the firm's address at 7200 Wisconsin Avenue in Bethesda and to the Rule of 72, a shortcut to estimate the number of years required to double one's money at a given annual rate of return: Years required to double investment = 72 ÷ compound annual interest rate.

Clients of the new practice enjoy the highest level of personalized, professional service from a well-rounded, dedicated team of experts who are focused exclusively on meeting their needs. Previously, as employees of a major wire house, Fautrel and Carlson shared both professional and support services with dozens of other advisors.

"Our clients, who include corporate executives, highly compensated professionals, as well as affluent families, have complex financial needs," Carlson says. "The team we've assembled, which includes a CERTIFIED FINANCIAL PLANNER™ who formerly worked at FINRA, a 401(k) specialist, a dedicated trader and a vice president of client relations, are uniquely positioned to meet those needs."

Top-notch Private-Client Service

"Our initial thought had been to start our own, completely independent firm, but there were two major drawbacks to that approach," Fautrel says. "For one, we wanted to be able to offer our clients a financially strong custodian so they could feel confident their money was safe. Second, we knew it would be extremely time-consuming for us to develop the necessary infrastructure and back-office support, including a bond desk, a trading desk and compliance, website/app and statements, on our own. We felt our time would be better spent on working with our clients." The Wells Fargo Financial Network platform addresses both concerns.

Services Offered Through Seventy2 Capital Wealth Management

- *Retirement Planning*
- *Tax Management*
- *Estate Planning Strategies*
- *Education Funding*
- *Risk Management*
- *Investment Planning*
- *Employee and Executive Benefits*

"The more we learned about Wells Fargo Financial Network, the clearer it became that it was the right solution for our – and, more importantly, our clients' – needs," adds Carlson. "Now we are able to offer our clients the best of both worlds: a strong, well-established financial custodian plus top-notch, private-client service."

Seventy2 Capital
WEALTH MANAGEMENT
WELLS FARGO ADVISORS FINANCIAL NETWORK

7200 Wisconsin Avenue, Suite 204 | Bethesda, MD 20814 | 301-298-2230 | seventy2capital.com