

Seventy2 Capital

WEALTH MANAGEMENT
WELLS FARGO ADVISORS FINANCIAL NETWORK



In the News

Seventy2 Capital is honored to be leading the way as thought leaders in wealth management. We're delighted to share some recent articles including one featuring a valued client. We are always interested in what our clients are doing so please let us know. If you are approaching or over 50, read on for some important, retirement planning info. In the meantime, enjoy the summer and check our website regularly for upcoming events and news!

[Visit our Website](#)

In The Spotlight: Heather McAllister — Penn Foster

Our clients are doing notable and fascinating things to improve the world we live in. Learn about Heather McAllister and how she and Penn Foster are improving access to affordable education, empowering today's workforce and meeting the demand for middle-skilled workers. We are honored to have Heather as a client and to help give her the time to "focus on her work and dedicate herself to being a businesswoman and lawyer."



[Read the Article in Vanguard Law](#)

Recognition for the Seventy2 Capital Internship Program

Our summer internship program is operating at full steam for a second summer under the guidance of James Brockett, who has a personal connection to the program. Before becoming an advisor, James was a Seventy2 Capital intern from the University of Maryland. This program is the continuation of a longer legacy for the firm's founders. After participating in an internship during college and running an award winning, training program at another firm, Co-founder and Partner, Thomas Fautrel, aspired to provide training and mentoring to college students. "I want to give them the same experience I had," says Tom. "There aren't a lot of internship opportunities in wealth management for young people."



[Read the Full Article](#)

Seventy2 Capital Case Study Featured in National Publication

Having proven their market savvy with the big financial wirehouses, Seventy2 Capital Co-founders, Paul Carlson and Thomas Fautrel, opted for the more personal approach of their own boutique investment advisory firm. The firm and their dedicated and skilled team of professionals including Michael Levitsky and John Benjamin, CFPTM were featured in an April 2018 case study by *Vision Magazine*. It highlighted our team approach and collaboration with attorneys and accountants as keys to providing exemplary client service.



"I'd be hard pressed to find another office with as much experience and diversity as ours," says Fautrel, who primarily advises Fortune 500 executives on retirement options and diversifying concentrated stock positions.

Wealth Management 101

Did you know that if you are age 50 or older you are eligible to make additional "catch-up" contributions to retirement savings accounts?

As you get closer to age 50, you may want to take another look at your retirement goals to determine if this may be right for you. Doing so may be a game changer by possibly accelerating retirement, and, at the very least, making it all that more comfortable and enjoyable. Regardless of your age, now is the time to continue to focus on maximizing your retirement savings while also looking ahead to develop a plan that supports your vision of life post-retirement. Contact your Seventy2 Capital advisor to learn more about "catch up" contributions and create a retirement income plan that works for you.

[Contact Your Advisor](#)

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