



## Troy Elser

Partner

Troy.Elser@seventy2capital.com

443-589-5591

Troy Elser leads the Seventy2 Capital office in Hunt Valley as a Partner and Financial Advisor. He has over 20 years of experience as a Financial Advisor. He strives to build long-term relationships with clients by delivering a superior experience and helping them embrace their financial future with confidence. He ardently believes that by having a plan, staying the course, and surrounding oneself with genuine, trustworthy professionals, you will exceed your life goals.

Troy serves high net worth individuals through his extensive knowledge in portfolio management, investment planning, and estate planning. Prior to Seventy2 Capital, Troy spent 11 years at UBS financial services where he built the Elser Wealth Management team. His previous experience includes 10 years at Morgan Stanley in Baltimore as a Senior Vice President and Branch Manager and one year at Legg Mason as Client Service Associate in their Mutual Funds group.

Troy was named a Five Star Professional Wealth Manager in 2021\*. He graduated with a BS in Business Management and Marketing from Lebanon Valley College where he played Division III basketball and was a member of the NCAA Division III National Championship team. Troy is active in his hometown of Parkton, MD where resides with his wife and three kids.

\*The Five Star Wealth Manager award, administered by Crescendo Business Services, LLC (dba Five Star Professional), is based on 10 objective criteria. Eligibility criteria – required: 1. Credentialed as a registered investment adviser or a registered investment adviser representative; 2. Actively licensed as a registered investment adviser or as a principal of a registered investment adviser firm for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by Five Star Professional, the wealth manager has not: A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three settled or pending complaints filed against them and/or a total of five settled, pending, dismissed or denied complaints with any regulatory authority or Five Star Professional's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through Five Star Professional's consumer complaint process; feedback may not be representative of any one client's experience; C. Individually contributed to a financial settlement of a customer complaint; D. Filed for personal bankruptcy within the past 11 years; E. Been terminated from a financial services firm within the past 11 years; F. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients. Evaluation criteria – considered: 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. Award does not evaluate quality of services provided to clients. Once awarded, wealth managers may purchase additional profile ad space or promotional products. The Five Star award is not indicative of the wealth manager's future performance. Wealth managers may or may not use discretion in their practice and therefore may not manage their client's assets. The inclusion of a wealth manager on the Five Star Wealth Manager list should not be construed as an endorsement of the wealth manager by Five Star Professional or this publication. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by Five Star Professional in the future. For more information on the Five Star award and the research/selection methodology, go to [fivestarpromotional.com](http://fivestarpromotional.com). 2,029 Baltimore-area wealth managers were considered for the award; 237 (12% of candidates