



Mike Levitsky, CFA®, CAIA®

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Mike Levitsky is a Senior Vice President and Financial Advisor at Seventy2 Capital. He leads the practice's Investment Committee and manages Seventy2 Capital's discretionary investment strategies. He has expertise helping corporate executives and legal professionals in the Washington, DC area with investment planning and consolidated stock position diversification. Mike builds custom investment strategies to mitigate risk using alternative investments, primary market instruments, and derivatives.

Mike joined Seventy2 Capital at the onset, after spending 5 years as a financial advisor at Morgan Stanley where he was responsible for new business development, portfolio management, and the firm's Central Maryland Internship Program. Previously, he worked with the Grameen Foundation and Grassroots Business Fund as a consultant conducting valuation and research in the fields of microfinance and impact investing.

Mike is a double degree/triple major graduate of the University of Maryland with a B.A. in Economics and a B.S. in Finance and International Business. He holds the Chartered Alternative Investment Analyst® (CAIA®) as well as the Chartered Financial Analyst (CFA®) designations. He has also been named a Five Star Wealth Manager for 2019, 2020 and 2021*. Mike speaks fluent Russian and conversational French. In his free time, he volunteers with several foundations in the Washington, DC area and enjoys playing golf and hockey.

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*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. 2,091 Washington, D.C. - area wealth managers were considered for the award; 121 (6% of candidates) were named 2021 Five Star Wealth Managers. 2020: 2,535 considered, 115 winners; 2019: 1,956 considered, 122 winners.