



**Don Dearie, CFP®, CRPC®**

Vice President

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In his role as a Vice President at Seventy2 Capital, Don Dearie is committed to providing his clients with extraordinary service and value that goes beyond their investment portfolio. He serves clients with needs that may vary and range from traditional investments, alternative investments, and liability management to charitable giving and insurance. Above all, Don prides himself on helping good people make smart financial decisions.

Prior to Seventy2 Capital, Don spent 10 years as a Senior Financial Advisor and Vice President with Merrill Lynch Wealth Management. Prior to that, he was a Vice President at Providence Group, a private equity firm located in New York. These experiences allow him to serve corporate executives, business owners and families with multigenerational wealth who have complex financial needs but little time to manage their money on their own. As a result, he believes it is important to maintain a lower client to advisor ratio, communicate as needed, and stay on top of their financial priorities.

Don is a CERTIFIED FINANCIAL PLANNER™ (CFP®) professional and holds the Chartered Retirement Planning Counselor (CRPC®) designation which is bestowed by the College for Financial Planning. In 2021, he was named a Five Star Wealth Manager\*. Furthermore, he earned a Bachelor's in Business Accounting from Hofstra University and is a member of their alumni association. Outside of the office, Don is a Board Member of the Abilities Network, an Eagle Scout and is an active volunteer within the National Pike District Boy Scouts of America. He has participated in a number of endurance events and is an avid outdoorsman who enjoys golf, tennis, hiking, and skiing.

\*The Five Star Wealth Manager award, administered by Crescendo Business Services, LLC (dba Five Star Professional), is based on 10 objective criteria: 1. Credentialed as a registered investment adviser or a registered investment adviser representative; 2. Active as a credentialed professional in the financial services industry for a minimum of 5 years; 3. Favorable regulatory and complaint history review (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<sup>1</sup>); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients; 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 awarded. Once awarded, wealth managers may purchase additional profile ad space or promotional products. The award methodology does not evaluate the quality of services provided and is not indicative of the winner's future performance.

<sup>1</sup>To qualify as having a favorable regulatory and complaint history, the person cannot have: 1. been subject to a regulatory action that resulted in a suspended or revoked license, or payment of a fine, 2. had more than three customer complaints filed against them (settled or pending) with any regulatory authority or Five Star Professional's consumer complaint process, 3. individually contributed to a financial settlement of a customer complaint filed with a regulatory authority, 4. filed for bankruptcy, or 5. been convicted of a felony.