



Don Dearie, CFP®, CRPC™

Senior Vice President

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Client education is the driving force behind Don's approach to wealth management. He provides his clients with the knowledge to help achieve their desired financial outcomes with the highest probability of success. Working with a select number of clients, Don offers strategic, personalized investment advice and guidance as well as customized financial strategies to affluent individuals and families, corporate executives, business owners, foundations, and endowments.

His career in financial services started in 2008. Since then, Don has earned several designations, including the Chartered Retirement Planning Counselor™ (CRPC™) and the CERTIFIED FINANCIAL PLANNER™ (CFP®) certification, awarded by the Certified Financial Planner Board of Standards, Inc. In 2021, Don was named a Five Star Wealth Manager*. Prior to joining Seventy2 Capital, Don spent ten years as a Senior Financial Advisor and Vice President with Merrill Lynch Wealth Management. Earlier in his career, he was a Vice President at Providence Group, a private equity firm located in New York.

Don earned a bachelor's degree from Hofstra University and is a member of their alumni association. Outside of the office, Don is an Eagle Scout and 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, and skiing. Don lives in Montgomery County, Maryland with his wife, son, and chocolate lab.

The Five Star Wealth Manager award was issued on October 17, 2021 by Five Star Professional (FSP) for the time period January 4, 2021 through July 23, 2021. Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. The award 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 FSP, 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 FSP's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through FSP'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. FSP does not evaluate quality of services provided to clients. The 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 clients' 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 FSP 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 FSP in the future. 2091 Washington, D.C. area wealth managers were considered for the award; 121 (6% of candidates) were named 2021 Five Star Wealth Managers. Visit fivestarpromotional.com.

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