



## Amy Roberts, CRPC<sup>®</sup>, AAMS<sup>®</sup>

Assistant Vice President

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As an Assistant Vice President at Seventy2 Capital, Amy Roberts advises clients on retirement income and planning strategies, estate planning strategies, charitable giving, family finances and education savings. She has a focus on helping women achieve their financial goals which has led to recognition consecutively from 2014 – 2018 and to regular invitations from women's groups to educate on the topics of investment management and personal finances.

Amy has been selected as a Five Star Wealth Manager between 2015, 2016, 2017, 2019, 2020, 2021, and 2023\* as featured in the 2021 October/ November 2021 issue of Fortune Magazine's Women in Wealth section. As a result of her dedication to the profession and increasing her wealth management knowledge, Amy has earned the Chartered Retirement Planning Counselor™ (CRPC<sup>®</sup>) and the Accredited Asset Management Specialist™ (AAMS<sup>®</sup>) professional designations. She graduated from Towson University with a Bachelor of Science in Psychology.

Outside of the office, her personal passions are traveling, wine tasting and supporting the Fallston Animal Rescue Movement.

The Five Star Wealth Manager award was issued on January 1, 2023 by Five Star Professional (FSP) for the time period April 18, 2022 through October 21, 2022. 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. 2126 Baltimore-area wealth managers were considered for the award; 256 (12 percent of candidates) were named 2023 Five Star Wealth Managers. Visit [www.fivestarpromotional.com](http://www.fivestarpromotional.com).

Award issued on January 1, 2021 by Five Star Professional (FSP) for the time period April 27, 2020 through October 30, 2020. 1975 Baltimore-area wealth managers were considered for the award; (12 percent of candidates) were named 2021 Five Star Wealth Managers.

Award issued on January 1, 2020 by Five Star Professional (FSP) for the time period April 1, 2019 through November 13, 2019. 1898 Baltimore-area wealth managers were considered for the award; 234 (12% of candidates) were named Five Star Wealth Managers.

Award issued on January 1, 2019 by Five Star Professional (FSP) for the time period April 19, 2018 through November 7, 2018. 1865 Baltimore-area wealth managers were considered for the award; 265 (14% of candidates) were named Five Star Wealth Managers.

Award issued on December 1, 2016 by Five Star Professional (FSP) for the time period March 26, 2016 through November 11, 2016. 1093 Baltimore-area wealth managers were considered for the award; 355 (32% of candidates) were named Five Star Wealth Managers.

Award issued on December 1, 2016 by Five Star Professional (FSP) for the time period March 26, 2016 through November 11, 2016. 1093 Baltimore-area wealth managers were considered for the award; 355 (33% of candidates) were named Five Star Wealth Managers.

Award issued on December 1, 2015 by Five Star Professional (FSP) for the time period June 16, 2015 through November 9, 2015. 1215 Baltimore-area wealth managers were considered for the award; 356 (30% of candidates) were named Five Star Wealth Managers.