



## **Kevin Toohill, PIM Portfolio Manager**

Executive Director & Financial Advisor

[kevin.toohill@seventy2capital.com](mailto:kevin.toohill@seventy2capital.com)

203-571-3476

As an Executive Director and Financial Advisor at Seventy2 Capital Wealth Management, Kevin Toohill takes a holistic approach to wealth management. Working primarily with high net worth individuals, Kevin discusses his clients' goals with them to understand their priorities, then curates wealth plans that lead to investment allocation, risk management, and more.

Kevin has been in the investment industry since 1999 where he has served as an Investment Director with Citigroup Asset Management, a Financial Planning Specialist with Smith Barney and the last 15 years as a Senior Vice President – Wealth Management with UBS Financial Services. His strength and experience in asset management provide the team with an in-depth perspective on professional money management and investment planning. Additionally, Kevin was named on the Forbes Best-in-State Wealth Advisors list in 2023.

Kevin earned a Bachelor of Science degree in Marketing with a minor in Economics from Fairfield University, where he also played Division I baseball. Kevin currently resides in Wilton, CT with his wife Jamie and two sons, Conor and Gavin. He enjoys spending time with his family, coaching, and playing golf.

The Forbes Best-in-State Wealth Advisors rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

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