



## Michael Hartman, CFP®

Executive Vice President

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As Executive Vice President at Seventy2 Capital, Michael serves high-integrity and successful business owners, professionals, retired individuals, and families by providing comprehensive wealth management strategies and investment planning advice. He has developed a successful practice emphasizing long-term client relationships built on a foundation of ethics, respect, trust and quality personal service. Michael's ultimate objective is to assist his clients in making educated, sensible financial decisions in order to help them enjoy their lives more fully.

Michael joined Seventy2 Capital from Wells Fargo Advisors and was previously an advisor with Morgan Stanley Smith Barney and Legg Mason. Prior to entering the wealth management industry, he was a staff accountant at McGladrey & Pullen where he conducted audits and prepared tax returns for small businesses and mutual fund companies though he no longer offers these services.

Michael is a CERTIFIED FINANCIAL PLANNER™ Professional and holds an MBA in Finance from the University of Notre Dame and a BSBA in Accounting from Bucknell University. He has been selected as a Baltimore Five Star Wealth Manager, as seen in Baltimore Magazine, from 2012 through 2021 and was included in the 2023 100 AdvisorHub Advisors to Watch (Over \$1B). When away from the office, Michael enjoys spending time with his wife and two kids, who are actively engaged in the world of Junior Golf tournaments throughout the State of Maryland.

The Five Star Wealth Manager award was issued on January 1, 2021 by Five Star Professional (FSP) for the time period April 27, 2020 through October 30, 2020. 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. 1975 Baltimore-area wealth managers were considered for the award; (12 percent of candidates) were named 2021 Five Star Wealth Managers. Visit [www.fivestarpromotional.com](http://www.fivestarpromotional.com).

Award issued on January 1, 2018 by Five Star Professional (FSP) for the time period April 21, 2017 through November 6, 2017. 1759 Baltimore-area wealth managers were considered for the award; 232 (13% 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.  
Award issued on January 1, 2015 by Five Star Professional (FSP) for the time period June 16, 2014 through November 9, 2014. 1749 Baltimore-area wealth managers were considered for the award; 412 (24% of candidates) were named Five Star Wealth Managers.  
Award issued on January 1, 2014 by Five Star Professional (FSP) for the time period June 16, 2013 through November 9, 2013. 1484 Baltimore-area wealth managers were considered for the award; 395 (27% of candidates) were named Five Star Wealth Managers.  
Award issued on January 1, 2013 by Five Star Professional (FSP) for the time period June 16, 2012 through November 9, 2012. 1490 Baltimore-area wealth managers were considered for the award; 448 (30% of candidates) were named Five Star Wealth Managers.  
Award issued on January 1, 2012 by Five Star Professional (FSP) for the time period June 16, 2011 through November 9, 2011. 1470 Baltimore-area wealth managers were considered for the award; 262 (18% of candidates) were named Five Star Wealth Managers.

The AdvisorHub 2023 Advisors to Watch (A2W) rating produced by AdvisorsHub is based on industry experience, assets under management, revenue, growth, compliance records, professionalism, and other criteria from December 31, 2021 to December 31, 2022. Investment performance is not a criterion. A self-completed survey was used for consideration. A2W winners are redefined into subcategories and then ranked with the subcategory based on scale, growth and professionalism. The rating and ranking are not related to the quality of the investment advice and based solely on the disclosed criteria. Being placed on the subcategory does not denote an additional award.

PM-05092025-6087798.11