Listed alphabetically.

Name, address, phone number Area code: 203 (unless otherwise noted) Website	Title (bold) Email address	Description of services/specialty	Name, address, phone number Area code: 203 (unless otherwise noted) Website	Title Email address	Description of services/specialty
Barbara McMahon Merrill Lynch Wealth Management 63 Copps Hill Road, Ridgefield 06877 894-7824 ● wealthmanagement.ml.com	**Senior financial advisor** barbara_mcmahon@ml.com	Accredited asset management specialist in the global wealth management division of Merrill Lynch, Ridgefield	Jim Pratt-Heaney CIMA LLBH Private Wealth Management 33 Riverside Ave., Westport 06880 683-1527 ● llbhpwm.com	**Co-founder** and **CEO** jpratt-heaney@llbhpwm.com	Manages employees and business operations, serves as chief compliance officer, manages the executive of the firm's asset allocations that are customized for each client
Bill Loftus LLBH Private Wealth Management 33 Riverside Ave., Westport 06880 683-1528 ● llbhpwm.com	**Co-founder** and **partner** bloftus@llbhpwm.comx	Leads the corporate executive services, lending and alternative investment operations of the firm	John L. O'Brien Advanced Financial Advisors L.L.C. 2 Old New Milford Road, Suite 3F, Brookfield 06804 796-0082 ● advancedfinancialadvisors.com	**Partner** john.obrien@lfg.com	Comprehensive financial planning, including wealth accumulation, investment planning and wealth management, employee benefits, retirement income planning strategies, business succession and estate conservation and charitable giving strategies
Bill Lomas CFP, CIM LLBH Private Wealth Management 33 Riverside Ave., Westport 06880 683-1526 ● llbhpwm.com	**Certified financial planner** blomas@kkbhpwm.com	Certified financier planner and chartered retirement planning specialist; leads the holistic planning process for the company	Kenneth R. Russell Jr. GenSpring Family Offices L.L.C. 4 Greenwich Office Park, Greenwich 06831 661-6616 ● genspring.com	**President**	Asset allocation, investment policy creation, multigenerational planning, acquisition and financing of closely held businesses
Brian Fink CFP Pacilio Wealth Management 450 Post Road East, Westport 06880 286-4137● paciliowealth.com	**Vice president** and **private wealth advisor** brian@paciliowealth.com	Financial advisor, certified financial planner; comprehensive wealth analysis and financial forecasting, asset allocation strategies, risk management	Kevin Burns LLBH Private Wealth Management 33 Riverside Ave., Westport 06880 683-1525 ● llbhpwm.com	**Co-founder** and **partner** kburns@llbhpwm.com	Leads new client asset acquisition and manages company's West Coast operations
Brian Hathaway Investors Capital Management Inc. 1120 Post Road, Darien 06820 656-7235 • incapman.com	**Co-chief investment officer** and **chief compliance officer** icm@incapman.com	Focuses on portfolio management, marketing and new client contact	LeGrand S. Redfield Jr. CLU, ChFC, CFP Asset Management Group Inc. 60 Long Ride Road, Suite 305, Stamford 06902 964-8300 ● amgplanning.com	**President** and **CEO** lee@amgplanning.com	Financial planning, asset allocation, risk management and retirement planning
Brian Hetherington The Hetherington Group 4 Cherry St., New Canaan 06840 972-2523 • pbig.ml.com	**Senior resident director, private wealth, managing director-wealth management**	Asset allocation and portfolio modeling, private banking, long-term financial strategy, trust and estate-planning strategy, credit and lending services, business and corporate, concentrated and restricted stock services, philanthropy	Ronald A. Sages CTFA, CFP, AEP Chapin Asset Management Inc. 15 E. Putnam Ave., Suite 264, Greenwich 06830 255-9993 ● chapinasset.com	**Co-founder** and **president**	Design and management of taxable portfolios for individuals and personal trust arrangements
Dan Besse CIMA Pacilio Wealth Management 450 Post Road East, Westport 06880 286-4136 ● paciliowealth.com	**Managing director** dan@paciliowealth.com	Customized portfolio management, financial planning, private banking, liability management, trust and legacy planning, wealth protection and transfer strategies, tax planning	Steven Baker Investors Capital Management Inc. 1120 Post Road, Darien 06820 656-7235 • incapman.com	**President** icm@incapman.com	Advising, managing and protecting clients' assets
Daniel J. Sullivan The F.E.D. Wealth Management Group at Morgan Stanley 1 Fawcett Place, Third floor, Greenwich 06830 861-5757 ● morganstanleyfa.com/fedgroup	**Managing director** and **chief compliance officer**	Custom-tailored investment strategies	Thomas Pacilio Pacilio Wealth Management 450 Post Road East, Westport 06880 286-4130 ● paciliowealth.com	**President** tom@paciliowealth.com	Consultative wealth manager to individuals and their families; assumes the role of producing branch manager at several financial institutions
Frederick Bitsky CFP WealthGuard L.L.C. 1465 Post Road East, Suite 100, Westport 06880 222-0404 ● wealthguardllc.com	**President** rick@wealthguardllc.com	Wealth planning and management	Lawrence Bernstein Prime Financial Services 64 Danbury Road, Suite 301, Wilton 06897 966-7243 ● pfinancialservices.com	**Managing partner** lbernstein@pfinancialservices.com	Tax planning, protection, wealth accumulation, retirement planning and distribution, estate planning, business planning
George T. Hubbard Algonquin Advisors 2 Greenwich Office Park, Greenwich 06831 629-2114 ● algonquinadvisors.com	**Managing partner** and **chief investment officer**	Strategic investment advisor	Leonard DiCostanzo CLU Northwestern Mutual The Bender Financial Group 285 Riverside Ave., Suite 200, Westport 06880 221-5200 • benderfinancialgroup.nmfn.com	**Managing director** len.dicostanzo@nmfn.com	Estate, long-term care, employee and executive benefits, investment, disability income and financial planning
Haley Rockwell CFP LLBH Private Wealth Management 33 Riverside Ave., Westport 06880 987-6131 ● llbhpwm.com	**Managing director** hrockwell@llbhpwm.com	Senior client relationship manager with responsibility for investment and planning services	Pamela Kiernan CRPC Merrill Lynch 301 Tresser Blvd., Stamford 06901 326-8667 ● fa.ml.com/pamela_kiernan	**Wealth management advisor** pamela_kiernan@ml.com	Investment and financial-planning solutions
H. Thomas Gnuse HTG Investment Advisors Inc. 50 Locust Ave., New Canaan 06840 (800) 810-1119 ● htginvestmentadvisors.com	**President** and **chief investment officer** htg@htgadvisors.com	Investment management, financial planning	Walter Pierz CLU Northwestern Mutual The Wilton Financial Group 372 Danbury Road, Suite 255, Wilton 06897 834-3240 • wiltongroup.nmfn.com	**Managing director**	Estate, long-term care, employee and executive benefits, investment, disability income and financial planning

Questions or comments, call (914) 694-3600, ext. 3005.