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## **Congress Wealth Management Welcomes Gerald J. Graves and Chris Dudley**



*Gerald Graves*  
*West Coast Managing Partner*



*Chris Dudley, CFP®*  
*Senior Financial Advisor*

**(Boston, MA) – July 25, 2019** – Congress Wealth Management announced today it has named Gerald J. Graves as the West Coast Managing Partner and Chris Dudley, CFP® as a West Coast Partner and Senior Financial Advisor.

These new senior team members will lead Congress Wealth Management’s West Coast initiatives, which include expanding the firm’s footprint in the West, enhancing services available to Congress Wealth clients nationwide and the overall expansion of the firm’s client base. The team has a long history of working with complex clients, including entrepreneurs and professionals from the Entertainment, Media, and Sports industries.

“We are pleased to welcome both Gerald and Chris to our team,” said Paul Lonergan, President of Congress Wealth Management. “Gerald’s knowledge of the West Coast market and track-record of client work makes him uniquely qualified to lead our expansion in the region. Chris’s sophisticated approach to managing the assets of complex high-net-worth clients brings additional depth to our overall service capabilities. Together they are exceptional additions to the Congress Wealth family.”

As the West Coast Managing Partner, Mr. Graves will lead the firm's future Orange County, CA office and will be responsible for the growth and expansion of Congress Wealth's business throughout California, Oregon and Washington.

Mr. Dudley will be based in the firm's future Orange County, CA office serving clients both locally and across the country, helping them navigate the unique complexities of their financial lives.

Mr. Graves joins Congress Wealth Management from Boston Private Wealth where he was Executive Managing Director for the firm's West Coast Division. Prior to Boston Private, Mr. Graves founded Filigree Advisors in Lake Oswego, Oregon which served private client families and professional athletes with over \$5 million of investable assets. Earlier in his career, Mr. Graves spent over 14 years with Schwab Institutional where he was Chief Operating Officer and a member of the firm's senior management team. Mr. Graves received his B.S. in Economics from the University of Oregon.

"I am thrilled to have the opportunity to join Congress Wealth Management and I look forward to leading the firm's efforts to expand on the West Coast." said Mr. Graves.

Mr. Dudley also joins from Boston Private Wealth where he was Director, Senior Wealth Advisor in Los Angeles, CA. Prior to Boston Private, Mr. Dudley was Chief Investment Officer at Filigree Advisors and Vice President of M Financial Wealth Management. Mr. Dudley also enjoyed a 16-year career in the National Basketball Association (NBA), during which he also served as Executive Treasurer of the NBA Players Association and a member of the Players Association Negotiating Committee. Mr. Dudley received the NBA's J. Walter Kennedy Citizenship Award in 1996 and USA Today's Most Caring Athlete Award in 1997. Mr. Dudley also founded and leads The Chris Dudley Foundation, which focuses on empowering children with diabetes to live active and successful lives. Mr. Dudley received his B.A. in Economics and Political Science from Yale University. He also holds the CERTIFIED FINANCIAL PLANNER™ professional designation.

"I am honored to have the opportunity to join Congress Wealth Management, work with new clients and be a key part of the firm's expansion to the West Coast," said Mr. Dudley.

### **About Congress Wealth Management**

Congress Wealth Management is a Boston-based, privately-held, SEC registered investment management firm providing innovative wealth solutions to high-net-worth individuals, families, foundations and endowments. Congress Wealth Management also has offices in Westport, CT and Scottsdale, AZ. Recently recognized as a Top 300 Registered Investment Advisor by Financial Times, Congress Wealth has built its assets under management from under \$200 million in 2009 to over \$2 billion today.