For Immediate Release
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Boston's Congress Wealth Management, LLC taps Michael Harty, CFA as Financial Advisor for new Scottsdale, AZ Office

BOSTON, MA | January 22nd, 2019 | Congress Wealth Management, LLC ("CWM"), a private wealth advisor for high-net-worth families, individuals and non-profits with $1.8b under management, announced today that Michael Harty, CFA has joined the firm as a Financial Advisor. Mr. Harty will be responsible for serving as a primary contact for clients and their families, providing comprehensive, holistic wealth management services for the firm. CWM's Scottsdale, AZ new office will service clients throughout the southwest and California.

"As our firm continues to expand, it is critical that we continue deliver superior service, and sound, objective advice to our clients. Mike Harty's expertise in financial planning and wealth management make him a tremendous addition to our service team and most importantly to our clients" said Paul Lonergan, President of CWM. "Our satellite office in Westport, CT has been extremely successful in attracting new clients, and we hope to model that success with our efforts in Scottsdale" added Lonergan.

Mr. Harty joins CWM from Charles Schwab & Co. where he served as a Financial Consultant in their La Jolla, CA branch and managed over 300 high net worth households. He received his Bachelor of Science in Finance from Northern Arizona University and is a CFA Charterholder.

Founded in 2009, CWM is a Boston-based, SEC-registered independent investment management firm offering high-net-worth individuals and families wealth advisory services and bespoke portfolio construction. The firm also develops innovative wealth solutions for small foundations and endowments.

CWM works in a strategic partnership with Congress Asset Management Company ($11b in AUM) as a Core manager to provide clients with access to a unique blend of seasoned investment professionals employing a collaborative process designed to reach timely, well-reasoned investment decisions.

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Congress Wealth Management, LLC is an independent Registered Investment Advisor affiliated with Congress Asset Management Company.