For Immediate Release
04-18-17

Boston's Congress Wealth Management, LLC taps Salim Boutagy, CFP as Financial Advisor for Westport, CT Office

---

BOSTON, MA | April 18, 2017 | Congress Wealth Management, LLC is pleased to announce the hiring of Salim Boutagy, CFP® as a Financial Advisor in the firm's Westport, CT office. Mr. Boutagy will be responsible for serving as a primary contact for clients and their families, providing comprehensive, holistic wealth management services for the firm. The Westport office services clients in Connecticut and New York.

"Over the last 12 months, our Westport, CT office has been extremely successful in attracting new clients, as well as expanding relationships with current clients throughout Connecticut and New York. We believe that Salim's professional experience is a perfect match for the bespoke investment and planning solutions we deliver for clients" said Paul Lonergan, President of Congress Wealth Management.

"Our Westport office has enjoyed greater than projected growth since its launch last year, and we are poised for even greater success in 2017 in the Connecticut-New York region. As our firm continues to expand it is critical that we deliver superior service, and sound, objective advice to our clients. Salim's expertise in financial planning and wealth management make him a tremendous addition to our service team and most importantly to our clients."

Most recently, Mr. Boutagy was a financial advisor in the Westport office of Wells Fargo Advisors where he was responsible for the management of around 110 client households, encompassing about $30 million in client assets. Before joining Wells Fargo Advisors in 2013, Salim worked on wealth management teams at UBS Financial Services and Morgan Stanley. Mr. Boutagy received his CFP designation in 2016 and is currently earning his M.S. in personal financial planning through the College for Financial Planning. He received his B.S. in Finance from Fordham University in 2008.

Founded in 2009, Congress Wealth Management 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. Congress Wealth Management currently manages $1.4b for its clients, and works in a strategic partnership with Congress Asset Management Company ($7b 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.

Meghan Leach ▪ Marketing Coordinator ▪ tel. 617.428.7629 ▪ fax 617.428.7699
Email: mleach@congresswealth.com