CONGRESS WEALTH MANAGEMENT

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Congress Wealth Management Announces Deal with Domus Capital Group, LLC

California wealth advisory enhances CWM's growing West Coast practice

(Boston, MA) – February 10, 2020 – Congress Wealth Management announced today that it has combined with Domus Capital Group, LLC, in Avila Beach, CA. This deal will further enhance Congress Wealth Management's growing presence on the West Coast.

"We are excited about our new strategic partnership with Domus Capital Group and the opportunity that this relationship presents to continue growing our West Coast market," said Paul Lonergan, President of Congress Wealth Management. "There is a cultural consistency between our two companies, and we share a similar approach to servicing high net-worth families."

Domus Capital Group, an SEC Registered Investment Advisor, focuses on family office services and wealth management to preserve family legacies.

Chris Bleuher, Principal of Domus Capital Group, LLC, will serve as Managing Director at Congress Wealth Management. Chris has over 30 years of experience in the financial services industry, including working as an institutional broker at the Chicago Board of Trade prior to becoming a wealth advisor in 1997. In 2012, Chris started Domus Capital Group, LLC, a boutique wealth management firm, to help preserve, manage, and protect family wealth by utilizing strategies built on the cornerstone of strong financial stewardship. Chris earned his B.A. in Economics from the University of Connecticut.

"Chris has a great depth of knowledge and looks to develop strong relationships with each individual client. He will be a perfect addition to our team," said Scott Dell'Orfano, Chief Strategic Officer of Congress Wealth Management. "Our West Coast practice has quickly emerged as a strong competitor in the wealth centers we target. This new partnership will enable us to further reach the clients we are uniquely suited to advise."

The Domus Capital Group acquisition follows the addition in July 2019 of Gerald J. Graves as Congress Wealth Management's West Coast Managing Partner, and Chris Dudley, CFP®, as a West Coast Partner and Senior Financial Advisor.

Graves and Dudley lead Congress Wealth's West Coast initiatives, which include the expansion of the firm's footprint in the West, enhancement of services available to Congress Wealth clients nationwide, and the overall growth 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.