Press Release

Congress Wealth Management is now CW Advisors

We are pleased to announce that Congress Wealth Management is rebranding to CW Advisors. The new name is rooted in our origins and also positions us for our ongoing evolution and future growth as we expand our offering to benefit all clients.

"Our new name underscores our commitment to elevating our clients' financial experience. While we have a rich history in wealth management, our capabilities encompass a broader advisory role. CW Advisors reflects our dedication to providing comprehensive and diversified advisory services tailored to meet the evolving needs of our clients," said Paul Lonergan, Chief Executive Officer of CW Advisors.

In addition to growing our geographic footprint, we expect the expansion of our solution set to enhance the client experience for the individuals and families we serve.

"Over the past several years, we have broadened our family office services, expanded access to alternative investments, and significantly upgraded our technology. Moreover, we continue to add to our talented team of Wealth Managers, investment professionals and relationship managers," said Ken Zannoni, President, Chief Wealth Officer. "As CW Advisors, our dedication to providing an exceptional experience for our clients remains unchanged."

Rich Villiotte, President, Chief Operating Officer added, "CW Advisors will continue to seek opportunities to enhance our offering to clients as we work together to achieve their financial goals."

In the coming weeks, CW Advisors will introduce its new branding and will launch a new website that reflects our expanded reach and capabilities.