

Rockefeller Capital Management Continues Robust Advisory Growth, Announces Three Wealth Teams Across Florida, Illinois

Boca Raton-based Faro and DBT Groups, and Chicago-based Bergman Wealth Management Group bring 15 new advisors to the firm's Private Wealth Management offering

New York (January 15, 2021) -- Rockefeller Capital Management ("Rockefeller" or the "Firm") today announced expansions to its Private Wealth Management business with additions of three wealth teams: The Faro and DBT Groups based in Boca Raton, Florida, and The Bergman Wealth Management Group, based in Chicago.

"We're excited to welcome our new teams aboard and to continue building off the robust pace of business growth set in 2020," said Chris Randazzo, President of Private Wealth Management for Rockefeller Capital Management. "Our approach remains thoughtful, selective, and unchanged: we are bringing to our company the industry's most accomplished professionals in supporting the complex needs and goals of wealthy individuals and families."

Joining the Southeast division, The Faro Group is led by Nelson Faro, Managing Director, Private Wealth Advisor and Portfolio Management Director, and also includes Forrest and Kyle Faro, joining as Senior Vice President, Private Wealth Advisor and Sports and Entertainment Director, and Senior Vice President and Private Wealth Advisor, respectively. The team also includes Rachel Baum, Private Wealth Advisor, as well as Janet Kolmetzky and Eileen Cambero, both Senior Client Associates. The team joins Rockefeller from Morgan Stanley Wealth Management.

Also in Boca Raton, The DBT Group is led by Marshall Duane, Managing Director and Private Wealth Advisor, who is joined by Christopher Bell, CFP® and Senior Vice President, and Thomas Tabor, Vice President and Private Wealth Advisor. The team also includes Lisa Tarshis, Associate Vice President and Senior Client Associate, as well as Mason Liu, Analyst and Private Wealth Advisor. The DBT Group joins Rockefeller from Merrill Lynch Wealth Management.

In Chicago, The Bergman Wealth Management Group is directed by Richard Bergman, Managing Director and Private Wealth Advisor, who is accompanied by Clayton Balko, Vice President and Private Wealth Advisor, Billie Danicek, Associate Vice President and Senior Client Associate, and Matthew Oye, Wealth Management Analyst. The group joins from Merrill Lynch Wealth Management and is the second private wealth management team to join Rockefeller's expanding Chicago presence.

Chris Dupuy, National Field Director for Rockefeller's Private Wealth Management practice, added: "We are pleased to be growing our presence in key markets in the Midwest and Southeast with high caliber teams like Bergman Wealth Management, and the DBT and Faro Groups. We look forward to the opportunity to offer our differentiated services to a growing number of clients in these regions."

With the addition of the Faro, DBT and Bergman Wealth Management Groups, Rockefeller's Private Wealth practice now includes 44 teams across the United States.

More about the Rockefeller Private Wealth Management business and the new teams can be found at:

Rockefeller Private Wealth Management: <https://rcm.rockco.com/global-family-office/>

The DBT Group: rcm.rockco.com/thedbtgroup/

The Faro Group: rcm.rockco.com/thefarogroup/

The Bergman Wealth Management Group: rcm.rockco.com/bergmanwealthmanagement/

About Rockefeller Capital Management

Rockefeller Capital Management is a leading independent, privately-owned financial services firm offering global family office, asset management and strategic advisory services to ultra-high-net-worth individuals and families, institutions, and corporations.

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