

## **Rockefeller Capital Management Broadens Private Wealth Business in California, Introduces First Newport Beach Team**

*The PBS Wealth Partners Group joins as the firm's first Newport Beach team in the Southwest Division*

New York (February 26, 2021) -- Rockefeller Capital Management ("Rockefeller" or the "Firm") today announced PBS Wealth Partners have become the firm's first Newport Beach, California team to join their Southwest division under Managing Director Nathan Crair.

PBS Wealth Partners is led by Alpesh Patel, CPFA, CRPC®, Managing Director and Private Wealth Advisor, Matthew Birkett, CPFA, CPWA®, CFP®, Senior Vice President and Private Wealth Advisor and Darren Siegrist, CEPA, Vice President and Private Wealth Advisor. The team of five is joining from Merrill Lynch Wealth Management and will also include Hai Dang, CPFA and Team Chief Operating Officer as well as Chris Iwamasa, Associate Vice President and Senior Client Associate.

"Rockefeller's Private Wealth business continues to demonstrate the value of unique yet integrated approaches to strategic client services, which is why we could not be more pleased to bring this offering to Newport Beach, California," said Crair. "PBS Wealth Partners are an excellent addition to our team, and we look forward to continuing to provide a high caliber offering to wealthy individuals and families in this area."

This growth builds on Rockefeller's [announcement of the first Denver, Colorado team](#) who joined the firm earlier this month. With the addition of PBS Wealth Advisors, Rockefeller's Private Wealth business now includes 46 teams across the United States, with offices in 15 cities. Additional California-based teams are in Los Angeles, San Francisco, and Walnut Creek.

More about the new team can be found at: [Rcm.rockco.com/pbswealthpartners/](https://rcm.rockco.com/pbswealthpartners/)

### **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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