Rockefeller Capital Management Reaches Major Milestone, Announces 50th Private Wealth Team

Adapt Partners in San Antonio, TX marks 9th team to join business in 2021

New York (April 1, 2021) -- Rockefeller Capital Management ("Rockefeller" or the "Firm") today has announced the hiring of Adapt Partners, the 50th team to join its Private Wealth Management offering, further illuminating the historic growth demonstrated since the Firm's launch in 2018.

"This is an important and exciting time for Rockefeller," said Chris Randazzo, President of Private Wealth Management at Rockefeller Capital Management. "We are pleased with the progress of the thoughtful approach we are taking to expanding our business while continuing to prioritize the delivery of highly personalized and customized solutions for our clients."

Offering integrated and holistic financial services in 18 cities across five divisions in the United States, Rockefeller has added offices in Cincinnati, Ohio, San Antonio, Texas, Newport Beach, California and Denver, Colorado in 2021.

"We continue to be energized by opportunities across markets to deliver the Rockefeller experience to an increasing number of individuals and families," said Christopher Dupuy, National Field Director for the Firm's private wealth business. "But we remain committed to growing selectively and strategically, ensuring that the bespoke service approach on which our company is based remains our greatest strength and our highest priority."

The 50th group to join the Firm, Adapt Partners, includes James Augustine, CIMA®, Senior Vice President and Private Wealth Advisor, David Lloyd, Jr., CEPA®, Senior Vice President and Private Wealth Advisor, Charles Hoffman, Jr., CRPC®, Senior Vice President and Private Wealth Advisor, Jeffrey Anderson, CFP® Vice President and Private Wealth Advisor, and Londa Willems, Vice President and Client Relationship Manager. The San Antonio, Texas-based team joins Rockefeller from UBS and will report to Division Director Michael Armondo.

More about the new team can be found at: rcm.rockco.com/adaptpartners/

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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