

Two Seventy2 Capital Advisors Named to 2024 Forbes Top Next-Gen Wealth Advisors Best-In-State List

BETHESDA, MD, UNITED STATES, November 21, 2024 /EINPresswire.com/ -- Seventy2 Capital Wealth Management, a client-centered, independent wealth management practice headquartered in the Washington DC – Baltimore region, announced today that two of their advisors were named to the [2024 Forbes Next-Gen Wealth Advisors Best-in-State](#) list: James

Brockett, Senior Vice President & Financial Advisor, and Michael Levitsky, Managing Director, Investment Strategy.



James and Mike have contributed so much to our practice, and I am confident they both have bright futures with Seventy2 Capital.”

Tom Fautrel, President & Co-Founder, Seventy2 Capital

“Congratulations to James and Mike!” said Thomas Fautrel, President & Co-Founder of Seventy2 Capital. “We are proud to have two founding members of our team recognized on a list that evaluates their revenue trends, assets under management, compliance records, industry experience, and best practices. James and Mike have contributed so much to our practice, and I am confident they both have bright futures with Seventy2 Capital.”

As a Senior Vice President with Seventy2 Capital, James Brockett strives to enhance his clients’ financial well-being by advising on the optimal investment mix. His practice focuses on investment allocation and wealth planning needs for individuals, families, and business owners. James believes that tailored and holistic investment advice is the key to meeting one’s most important financial goals. James also leads Seventy2 Capital’s internship program, a unique opportunity for college and graduate students to gain practical experience in wealth management.

Mike Levitsky is the Managing Director of Investment Strategy at Seventy2 Capital. He leads the practice’s Investment Committee and manages Seventy2 Capital’s discretionary investment strategies. Mike works with clients and advisors to build custom investment strategies to help mitigate risk using a variety of financial instruments across the risk spectrum. He also oversees the practice’s internal account operations and expansion modeling and economics.

About Forbes Top Next-Gen Wealth Advisors Best-In-State

2024 Forbes Top Next-Gen Wealth Advisors Best-In-State: Awarded August 2024; Data compiled by SHOOK Research LLC based on the time period from 3/31/23 - 3/31/24 (Source: Forbes.com). The Forbes Top Next-Gen Wealth Advisors Best-in-State rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

About Seventy2 Capital

Seventy2 Capital is a full-service, independent wealth management practice committed to supporting individuals, families, and business owners to achieve their financial goals. We are passionate about the work we do for our clients. We form a deep understanding of our client's goals and values and then develop and implement customized strategies that fit those objectives. Seventy2 Capital has been recognized as a Barron's Top 250 Private Wealth Management Team in 2024 and a Barron's Top 100 Private Wealth Management Team in 2023. For more information please visit www.seventy2capital.com.

2024 Barron's Top 250 Private Wealth Management Teams: Awarded May 2024; Data Compiled by Barron's based on the time period from Jan. 2023 – Dec. 2023 (Source: Barrons.com).

The Barron's Top 250 Private Wealth Management Teams are evaluated on a range of factors for the Financial Advisor and their team, who specialize in serving individuals and families. Factors included in the ratings include their previous year's size and shape, the regulatory records and credentials of their members, and the resources they have at their disposal to serve their client bases. Self-completed questionnaire was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

2023 Barron's Top 100 Private Wealth Management Teams: Awarded April 2023; Data Compiled by Barron's based on the time period from Jan. 2022 – Dec. 2022 (Source: Barrons.com).

The Barron's Top 100 Private Wealth Management Teams are evaluated on a range of factors for the Financial Advisor and their team, who specialize in serving individuals and families. Factors included in the ratings include their previous year's size and shape, the regulatory records and credentials of their members, and the resources they have at their disposal to serve their client bases. Self-completed questionnaire was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

About Wells Fargo Advisors Financial Network

For more than 20 years, Wells Fargo Advisors Financial Network (FiNet), the independent brokerage arm of Wells Fargo & Company, has simplified independence by partnering with successful financial advisors and fostering a mutual passion for doing what's right for clients. www.wfafinet.com

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC. Seventy2 Capital Wealth Management is a separate entity from WFAFN.

Katy Jones-Powe
Seventy2 Capital Wealth Management
+1 301-298-2242

[email us here](#)

Visit us on social media:

[LinkedIn](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/762641123>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2024 Newsmatics Inc. All Right Reserved.