

NEWS

FOR IMMEDIATE RELEASE



MEDIA CONTACT

Grace Voglezang

Impact Communications, Inc.

800-974-7753 / 913-649-5009

ImpactMediaManager@ImpactCommunications.org

Chicagoland Trifecta Capital Advisors Launches

*Privately-held, SEC Registered Investment Advisory Firm
Committed to Fiduciary Standards Offers Personalized Investment
Management and Financial Services*

Northbrook, Illinois, March, 17, 2022 – Cofounders Jeff Berman, Sue Oleari, and Paul Tromp announce the launch of [Trifecta Capital Advisors](#) (Trifecta), an SEC Registered Investment Advisory firm based in Northbrook, IL. This independently owned and operated firm is dedicated to providing an integrated approach to money management and financial well-being. Prior to founding the new firm, the three principals worked together in the Chicago Wealth Management Region of BMO Private Bank (BMO), which oversaw \$6.6B in client assets.

“Founding Trifecta is the culmination of our desire to bring our passion for client service, building relationships, and informed financial counsel to our clients,” said Oleari. “We chose the name Trifecta because it reflects the powerful combination of the talents, skills and experiences of our three founders.”

“As an independent firm, we needed to select a custodian to safeguard client assets and execute on our investment strategy,” explained Berman. “We chose Charles Schwab & Co., Inc. (Schwab), a leading custodian for independent advisors which custodies more than \$3.5 trillion in assets on behalf of over 13,000 independent RIA firms.”

“We embrace the fiduciary standard. That means we are legally obligated to put client needs first, 100 percent of the time,” said Tromp. “Our mission is crystal clear: enable clients to achieve their financial goals and to provide a customized, transparent and engaging client experience.”

THE TRIFECTA TEAM

Jeff Berman has been managing client assets for more than 20 years, having launched his career at LaSalle Bank in 1999. He joined BMO in 2010 as a Senior Portfolio Manager where he

confidently managed the largest portfolio nationally at over \$2B. Berman holds a BS in Finance from DePaul University in Chicago, and an MBA from Lake Forest Graduate School of Management. He is Series 65 licensed.

Sue Oleari began her career in finance nearly 30 years ago and most recently served as Regional President in Wealth Management at BMO. During her career, she managed a large portfolio of commercial relationships and progressed through multiple leadership roles in various lines of business. For five consecutive years, she and her female colleagues that led business units at BMO were awarded The Most Powerful Women in Banking Top Banking Team by American Banker magazine. She served as the Board Chair for BMO Harris Financial Advisors, is on the Board of Directors for the Joffrey Ballet, and dedicates her time and resources as a founding member of blood cancer support organizations. Oleari holds a BS in Finance with honors from the University of Illinois at Urbana-Champaign. She is Series 65 licensed.

Paul Tromp, a financial professional since 2000, spent the first two years of his career as an international tax consultant with Arthur Andersen. He then moved on to BMO, where he was a lead relationship manager and financial planner serving high net worth clients. His attentiveness and expert advice fostered a loyal and dedicated client base. Tromp earned a BA in Accounting from the University of Illinois in Urbana, Illinois. He is a Certified Public Accountant (CPA) and a CERTIFIED FINANCIAL PLANNER™ (CFP®) professional.

CLIENTS FRONT AND CENTER

“We’ll do everything that we can to help our clients reach their wealth accumulation, financial well-being, and legacy goals,” said Tromp. “Having embraced the fiduciary standard, we will always put clients’ needs first. As an independent Registered Investment Advisory firm, we have complete freedom to make this standard the cornerstone of our practice, enabling us to offer an approach to client service and an investment philosophy that is uniquely ours.”

“We are excited to be able to offer our clients expanded access to investment solutions,” added Berman. “By using industry-leading technology solutions, we can provide clients with a real-time, on-demand, customizable financial experience with which we can collectively track their progress. At Trifecta, there are no one-size fits all solutions.”

“We have been told repeatedly by our clients that their relationship with us brings them confidence and peace of mind,” Oleari said. “This is music to our ears. Our ability to listen intently and collaborate with our clients makes all the difference.”

ABOUT TRIFECTA CAPITAL ADVISORS

Trifecta Capital Advisors is a privately-owned SEC Registered Investment Advisor (RIA) based in Northbrook, IL. Founded in 2022, the firm provides comprehensive financial planning and investment management services to individuals and families. For additional information, please visit: www.TrifectaCapitalAdvisors.com.

###