NEWS

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Theresa Donatelli


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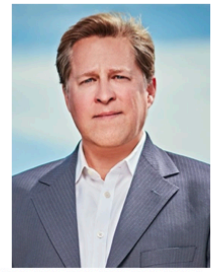
J McAraw

Principle Wealth Partners Welcomes Three Veteran Advisors and Supporting Team Members

CEO Robert Paolucci Reunites with Former Colleagues

MADISON, CONN (December 16, 2020) – Principle Wealth Partners (PWP) Founder and CEO Robert Paolucci announced today that Theresa V. Donatelli, Romaine A. Macomb and J Addison McAraw will be joining the firm as Senior Wealth Advisors. Also joining are their Senior Client Service Managers Ellie Kasimir, Liz Drega and Amy Lawler, all of whom have deep, trusting relationships with long-time clients. Donatelli, Macomb, McAraw and Paolucci are former colleagues and are thrilled to be working together again. With the three new advisors, PWP will manage $1.7 billion in client assets, served by a team of 19 people.

"We are so excited to have Theresa, Romaine, J, Ellie, Liz and Amy joining the Principle team," said Paolucci. "They are a like-minded, experienced, fiduciary group that shares our values, our focus on developing long-term relationships, and our passion for providing customized advisory solutions."

Donatelli, Macomb and McAraw will remain in their current office in Old Saybrook, Connecticut, creating PWP's third location. Their clients will experience little change. Client accounts will be custodied with Fidelity Investments℠, which will provide the team with enhanced investment and technology solutions, greater flexibility and best-in-class cybersecurity.

"It's wonderful to see former colleagues joining together and aligning around a shared vision, especially in an environment where firm culture has taken on new meaning for many advisors," said David Canter, head of the RIA and family office segments for Fidelity Institutional. "We're thrilled to support the team's transition and to welcome them and their clients to the Fidelity platform."

THE NEW ADVISORY TEAM

Theresa V. Donatelli has more than 28 years of experience as a financial services professional, working with families, corporations and their employees, endowments and non-profits. "I'm delighted to be joining the Principle team because of our shared approach to client service excellence and best of breed solutions. Bob is a friend, as well as a trusted professional, and I am delighted to provide my clients with the opportunity to work with the great teams we have built," said Donatelli.

Romaine A. Macomb, CFP®, AIF®, has over 30 years of experience within the wealth management profession, serving individuals, families, institutions and retirement plans. "Joining friends and former colleagues at Principle is an ideal move at this stage of my career," said Macomb. "Bob has built a high-quality team and a solid, forward-looking infrastructure which will enable us to focus on our clients' well-being, knowing that the operational details are being expertly handled. Philosophically, we are cut from the same cloth."

J Addison McAraw, a 25-year veteran of the investment industry, serves clients with diverse financial planning needs and objectives, helping them address investment, retirement, estate and charitable planning concerns. "Principle is a perfect new home for us," said McAraw. "As advisors, we work with all of our clients to plan for their futures and take the necessary steps to ensure that they can achieve their objectives. Joining Principle is an ideal way for us to continue to help clients reach their goals, while also planning for our own personal and professional futures."

ABOUT PRINCIPLE WEALTH PARTNERS

Principle Wealth Partners (PWP) is an independently owned and operated SEC registered investment advisory firm with offices in Westport, Madison and Old Saybrook, Connecticut. PWP provides comprehensive wealth management and customized planning services to entrepreneurs, executives, families, and businesses. With over a century of combined experience, and a philosophy rooted in behavioral finance, PWP commits to learning each client's individual goals and objectives to tailor solutions that meet their needs. Learn more at www.PrincipleWealthPartners.com.

ABOUT FIDELITY INVESTMENTS

Fidelity's mission is to inspire better futures and deliver better outcomes for the customers and businesses we serve. With assets under administration of $8.7 trillion, including discretionary assets of $3.4 trillion as of October 31, 2020, we focus on meeting the unique needs of a diverse set of customers: helping more than 32 million people invest their own life savings, 22,000 businesses manage employee benefit programs, as well as providing more than 13,500 institutions with investment and technology solutions to invest their own clients' money. Privately held for more than 70 years, Fidelity employs more than 47,000 associates who are focused on the long-term success of our customers. For more information about Fidelity Investments, visit https://www.fidelity.com/about-fidelity/our-company.

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