News

For Immediate Release

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Round Table Wealth Advisors Mariella Foley and Michael Fischer Earn Five Star Wealth Manager Awards

These two New Jersey wealth management professionals consistently show commitment to clients and maintain appropriate industry credentials

WESTFIELD, NJ [May 31, 2022] – Once again this year, two advisory team members of Round Table Wealth Management (RTWM), an SEC Registered Investment Advisory firm, have received the Five Star Wealth Manager Award based on 10 objective eligibility and evaluation criteria including client retention and a regulatory review. This marks Mariella Foley's seventh year of winning the award, and Michael Fischer's third year.

"The significant contributions that Mariella and Mike have made to our clients and firm over the past several years are outstanding," said Rich Policastro, President of RTWM. "Having them both achieve this award and accomplishment for multiple years is a testament to the quality of the relationships they've built and the professional, comprehensive services that we offer to our clients."

Five Star Professional conducts market-specific research to recognize wealth management professionals who consistently show a commitment to clients, demonstrate strong industry credentials and are evaluated on the quality of their current practice. Founded in 2003, the Five Star Award Program is the largest and most widely published award program in North America, covering more than 45 major markets.

Michael Fischer, honoree, believes that the team approach at RTWM is one of the reasons he is so successful. "I am grateful to work for a firm that continually seeks to provide first-class service to all clients. This attitude pushes me to always give my best, and it is an honor to see my hard work recognized with this award."

In order to earn the award, a wealth manager must satisfy eligibility and evaluation criteria that are associated with wealth managers who provide quality services to their clients. Among the factors considered are assets under management and client retention rate as well as a thorough regulatory review.

Mariella Foley, a seven-time award winner, shares her thoughts on the honor: "It means a lot to me to have received this award for consecutive years. As part of our fundamental principles, my goal is to provide the highest standard of service, a collaborative partnership, and a long-term commitment."

ABOUT MARIELLA FOLEY

Mariella Foley, CFP®, ADPA®, CDFA®, is a Partner and Wealth Advisor with Round Table Wealth Management. She has been with the firm since 2000 and has over 25 years of experience in the financial services industry. Heading the Women of Clarity™ program, Foley focuses her practice on working with women, advising them on their investments and finances and empowering them to take control of their financial lives whether they are experiencing a life transition due to divorce, death of a spouse or any other life changing event. Chosen to be a Featured Speaker for the InvestmentNews 2022 Women Adviser Summit, her areas of expertise include women in transition, female empowerment, multi-generational families, retirees and those going through divorce.

ABOUT MICHAEL FISCHER

Michael Fischer, CFP®, MST, Director and Wealth Advisor, has been a valued member of Round Table Wealth Management since 2011. Developing customized asset allocations, orchestrating comprehensive financial planning for each individual client and coordinating day-to-day client needs are just a small part of what makes him an outstanding member of the financial planning profession. Fischer focuses on solving the complex income and estate tax issues of his small business owner clients.

ABOUT ROUND TABLE WEALTH MANAGEMENT

Round Table Wealth Management (RTWM), an independent financial advisory firm established in 1999, is managed by four partners with over 100 years of industry experience. They, along with other members of the firm, form a dedicated team of highly-credentialed wealth advisors, financial planners, and investment management professionals.

Global in their investing and personalized in their service, the firm provides objective strategies designed to meet the far-reaching goals of each client in a personal and comprehensive manner. Those clients are comprised of high-net-worth individuals, families (national and global), business owners, professionals, and women investors seeking thoughtful financial advice and guidance to grow and preserve their wealth. Assisting cross-border clients and expats with multi-national interests and a high degree of tax complexity is a key area of focus. In addition, the firm specializes in working with families and individuals who have multi-generational wealth concerns.

With approximately $1.6B in assets under management (AUM) for its clients, RTWM offers personalized advisory services supported by institutional knowledge, deep experience, and skilled expertise. Their fiduciary approach involves a suite of holistic planning services including investment, philanthropy, retirement, insurance, cash flow and tax and estate counsel.

Learn more at www.RoundTableWealth.com.

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