

News

For Immediate Release

Media Contact:

Grace Vogelzang
Impact Communications, Inc.
913-649-5009

GraceVogelzang@ImpactCommunications.org



Round Table Wealth Management Accepts Awards, Provides Ongoing Business and Investment Insights

Awards, media attention, and webinars provide proof of fiduciary focus, client education, great workplace, team culture

WESTFIELD, NJ [October 27, 2022] – Over the past few months, [Round Table Wealth Management](#) (RTWM), an SEC Registered Investment Advisory firm, has been busy serving clients, building a great company culture, educating the general public, speaking with media outlets, and accepting awards.

#10 ON “BEST PLACES TO WORK” LIST

President Rich Policastro and head of marketing communications Regina Carmon attended the [NJBIZ](#) luncheon and accepted an award as one of the **Best Places to Work in New Jersey**. The 2022 awards program recognizes and celebrates top places of employment that benefit the state’s economy, workforce and business. RTWM ranked #10 out of 125 total firms honored, a score that pleasantly surprised Policastro and Carmon when it was announced live at the celebratory event. Scores were heavily based on a comprehensive confidential survey from company employees who weighed in on their workplace experience and why their company is an ideal workplace. To see the full list of the companies honored in all categories [click here](#).

“I am so proud of our company,” said Policastro, who previously held roles at Fidelity Investments and Charles Schwab. “Being named one of the Top Ten places to work in New Jersey is a testament to each and every employee who contributes to a collegial culture where every person feels valued and appreciated. We stand behind our guiding principles of a collaborative partnership and recognize each associate’s contribution to our success.”

RTWM PARTNER ACCEPTS WOMEN’S CHOICE AWARD®

RTWM Partner Mariella Foley accepted the invitation to become a part of the **Women's Choice Award® Financial Advisor** program. This program, which is focused on helping women make smart financial choices, was created by WomenCertified Inc., an organization that serves as “the Voice of Women.” Recipients were awarded this honor based on 17 objective criteria associated with providing quality service to women clients, such as educational and professional credentials, experience, and a favorable regulatory history, among other factors, including letters of validation and a background check. Financial advisors do not pay a fee to qualify for the program. The Women's Choice Award® Financial Advisors and Firms, which represent less than 1% of financial advisors in the U.S., are listed on womenschoiceaward.com. To view Foley's profile, [click here](#).

“This award supports my continued service and dedication to the empowerment and financial education provided to women seeking financial freedom,” Foley said.

RTWM FOUNDER FEATURED IN VENTEUR MAGAZINE

Formerly known as *Modern Professional*, *Venteur* magazine published an article that profiles RTWM Founder, Steven Giacona. In the article, titled A Founder's Journey, Giacona dives into what it takes to be a successful entrepreneur. He hits on the fact that many founders face obstacles and shares how he has turned challenges into learning experiences. To read the interview in its entirety, [click here](#).

“The responsibilities of a CEO are often much deeper than the job description articulates. The quantitative and strategic duties often dominate discussion topics rather than the qualitative and personal relationships that make up a successful organization,” Giacona said.

RTWM CHIEF INVESTMENT OFFICER PROVIDES INVESTMENT OUTLOOK

In a **webinar hosted by RTWM earlier this month**, Chief Investment Officer and Partner, Robert Davis, moderated an in-depth discussion and analysis of the current state of capital markets, the macroeconomic environment, and the top concerns facing investors today. The panel also outlined their outlook across asset classes and shared how the firm is positioning client portfolios for the months ahead. To receive a complimentary recorded copy of the webinar, [click here](#).

“Capital markets will continue to experience volatility. Investors may consider hedged equity index exposure and short-term fixed income to manage through these challenging times, yet maintain their longer-term allocation goals,” Davis said.

ABOUT ROUND TABLE WEALTH MANAGEMENT

Round Table Wealth Management (RTWM), an independent financial advisory firm established in 1999, is managed by five partners with over 100 years of industry experience. The 24-member firm brings a dedicated team of highly-credentialed wealth advisors, financial planners, and investment management professionals to support clients throughout all the ages and stages of life.

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) as of March 31, 2022 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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