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Cleveland Wealth Acquires Veteran Wealth Advisory Group With \$250 Million AUM to Augment Trajectory of Continued Growth

CLEVELAND, OH – (May 20, 2019) – Cleveland Wealth, LLC., a leader in financial planning and investment advisory services, recently announced the acquisition of a team of financial experts in an effort to augment the firm’s trajectory of continued growth.

Established in 2016 by industry veterans and principals Doug Sockman and Tom Stockett, Cleveland Wealth is a registered investment advisory firm that operates as a fiduciary for clients, offering comprehensive wealth management and financial planning services.

With plans to better serve clients, Cleveland Wealth recognized the need for a larger, revamped business model that would best meet changing client demands.

To expand their services, the firm has procured wealth advisors who were previously with Skylight Financial Group/Mass Mutual including: Bernie Garrah, John Blatt, Tim Farley and Corbin Blackburn. Additionally, the group’s talented support team will also be joining Cleveland Wealth, including Sarah Copp, senior business coordinator, and Lauren Kapalko and Amanda Hyland, who are experts in client services.

“Alongside our new team members from a veteran advisory group, we are confident that we’ve made a strategic move that will be an integral part of our long-term business strategy,” said Cleveland Wealth Principal, Doug Sockman. “We look forward to continuing on a path of expansion with the ultimate goal of scaling our firm.”

The new members bring over \$250 million of assets under management, decades of combined experience and several new specialties, including working with small business owners and executives of publicly traded companies.

For more information on Cleveland Wealth, visit www.clevelandwealth.com.

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