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## **Bartlett Wealth Management Announces New CEO, President**

*Downing will transition to new role as executive chair of firm*

**Cincinnati (January 5, 2021)** – [Bartlett Wealth Management](#) ("Bartlett"), a Midwest wealth management firm with offices in Cincinnati and Chicago, announced that effective January 1, 2021, Jim Hagerty, CFA, transitioned to the role of CEO and Holly Mazzocca, CFP® assumed the role of president at the firm. Kelley J. Downing, who has served as president and CEO of Bartlett or its predecessors for 13 years, will take on the new role of executive chair at the firm.

As Bartlett has grown, the necessity of separating these two crucial roles has become more apparent, with each position responsible for distinct functions. Both Hagerty and Mazzocca will continue to maintain client relationships in addition to their respective leadership responsibilities at the firm.

"We are thrilled to announce this evolution in Bartlett's leadership team by welcoming Jim and Holly as the new CEO and president of Bartlett, respectively," said Kelley Downing. "This was a well-thought-out succession plan that will ensure continuity and forward-thinking. The outcome is the result of a great deal of time and consideration – this transition has been in-process for nearly two years, taking into account the interests of both our firm and its valued clients."

Hagerty and Mazzocca will be supported by Bartlett's Management Committee, which added two new members: Brian Antenucci, CFA and Lori Poole, CFP®, RLP. They join Hagerty, Mazzocca, Kyle Pohlman, CFA, CAIA and Tom Steele, CPA, who as chief financial officer, serves as an ex-officio member. The group is instrumental in driving Bartlett toward growth in key areas including family office services, client experience, financial planning, investment management, talent management, and infrastructure support. This team reflects Bartlett's ongoing commitment to balancing experience and next generation leadership to position the firm for the future.

"I cannot express my appreciation and gratitude enough for everything Kelley has done for Bartlett," said Holly Mazzocca. "Kelley has always been undeterred by the glass ceiling. Under her guidance, Bartlett and its personnel have received many accolades.<sup>1</sup> Kelley's expertise has been instrumental in establishing Bartlett's forward-thinking initiatives and in expanding wealth management services for our clients."

Collectively, the new leadership team has set goals focused on providing customized

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<sup>1</sup> For more information, visit <https://bartlett1898.com/about-us/awards/>.

investment and financial planning solutions, impeccable client service, and guidance to assist clients in achieving their financial objectives. The transition in leadership continues to position Bartlett for organic growth and strategic acquisitions through planning led by the team of Downing, Hagerty and Mazzocca.

“Bartlett has a rich history of navigating leadership transitions through the 123-year history of the firm and its predecessors, and our team has been working toward this for some time. 2020 has obviously been a year unlike any other we’ve experienced in our lifetimes, but for Bartlett employees and clients, the timing for this leadership transition couldn’t be better,” said Jim Hagerty. “I know I speak for both myself and Holly when I say that the entire team is committed to continuing Bartlett’s tradition of excellent personalized service delivered with the highest of standards.”

Bartlett has experienced significant growth in the last five years, from more than \$3 billion in regulatory assets under management to more than \$6 billion<sup>2</sup> at the end of 2020. In 2020, Bartlett continued to grow its business and hire new employees, with five new members joining the team.

“Jim and Holly have already hit the ground running. They both had increased managerial and leadership responsibilities throughout 2020 in anticipation of this transition,” said Downing. “It has been my distinct honor to serve as Bartlett’s president and CEO. I look forward to continuing to serve Bartlett and our clients as executive chair. I have full confidence that Jim and Holly will continue to guide the firm seamlessly into the future, and I am excited for the expertise and possibility this duo brings.”

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### **ABOUT BARTLETT WEALTH MANAGEMENT**

*Bartlett Wealth Management (“Bartlett”) a leading Midwestern wealth management firm with offices in Cincinnati and Chicago, provides customized investment management and financial planning services to high net worth families, foundations and businesses throughout the Midwest. Bartlett takes pride in providing clients independent, personalized fiduciary advice through a team of distinguished investment and planning professionals. For more information, visit [www.Bartlett1898.com](http://www.Bartlett1898.com).*

### **Cautionary Note Concerning Forward-Looking Statements**

This release contains certain forward-looking statements that reflect Bartlett’s current views with respect to certain current and future events. These forward-looking statements are and will be, subject to many risks, uncertainties and factors relating to Bartlett’s operations and business environment, including, without limitation, uncertainty surrounding the current COVID-19 pandemic, which may cause future events to be materially different from these forward-looking statements or anything implied therein. Any forward-looking statements in this release are based upon information available to Bartlett on the date of this release. Bartlett does not undertake to publicly update or revise its forward-looking statements even if experience or future changes make it clear that any statements expressed or implied therein will not be realized. Additional information on risk factors that could affect Bartlett’s may be found in the filings with the Securities and Exchange Commission made by Focus Financial Partners, LLC of which Bartlett is a partner firm.

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<sup>2</sup> As of 11/30/20.