

Merger of Leading Wealth Management Firms Launches Wellington Wealth Strategies

Indianapolis-based firms The Wellington Group and TrustWealth Strategies join forces with \$750 million in combined assets managed.

INDIANAPOLIS (Sept. 26, 2023) — The Wellington Group and TrustWealth Strategies today announced an official merger to combine their leading wealth management firms, bringing together two established businesses with a combined \$750 million in assets under management.

The merger of The Wellington Group and TrustWealth Strategies closed earlier this month. Under the merger agreement, the new firm will operate under [Wellington Wealth Strategies](#), with the brand rollout already underway. Wellington Wealth Strategies is an investment advisor regulated by the Securities & Exchange Commission.

The Wellington Group was founded by President Tony Bonanno in 1996 to provide cutting-edge financial services that enhance and grow clients' lifetime financial success. Dedicated to the core principles of trust and integrity, Greg Freeman and Joe Hillman founded TrustWealth Strategies as a Registered Investment Advisor (RIA) to always place the client's needs and interests first. Together, the two companies represent more than 100 years of leadership in the wealth management space.

"Since founding The Wellington Group, my steadfast commitment has centered on our clients. Providing them with reliable services and customized guidance to attain lifelong financial prosperity has been our unwavering focus and goal," said Bonanno. "The evolution into Wellington Wealth Strategies was a thoughtfully deliberated move. Greg and Joe's team seamlessly align with our ethics and core values, affirming their position as the ideal partners to foster enduring success for our business and cherished clients."

As a result of the merger, Bonanno's new title will be Founder and Managing Partner of Wellington Wealth Strategies. Freeman and Hillman will serve as Founders and Partners with long-time members of The Wellington Group, Tom Cates and Max Moritz. As Chief Operating Officer, Nate Miller will spearhead the firm's growth. This union significantly expands the national leadership and advisory teams, boasting six founders and 20 financial advisors dedicated to serving clients across more than 40 states.

The move grows the services and capabilities Wellington Wealth Strategies will provide its national roster of clients by offering investment management, retirement planning, estate planning, and alternative investments. The firm also will provide more agile, client-centered retirement income planning and tax-planning services and work as a fiduciary partner to build a secure financial future for clients and their loved ones.

"Collaboratively, we unlock a realm of flexible and sophisticated investment opportunities, enhanced by a broad spectrum of cutting-edge technologies, catering to a diverse clientele," said Freeman. "This enables seasoned and new advisors to join our ranks, shaping customized investment strategies that genuinely prioritize clients' best interests. At Wellington Wealth Strategies, we strive to ensure that the legacies of our clients and advisors endure for generations to come."

WellingtonWealth

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The new entity will be located at 9000 Keystone Crossing in Indianapolis and continue operating satellite offices in Crown Point and Fort Wayne, Indiana. For more information or to learn more about its services, please visit WellingtonWealthStrategies.com.

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About Wellington Wealth Strategies

Wellington Wealth Strategies, the result of the strategic merger between two esteemed wealth management firms, proudly operates as a distinguished Registered Investment Advisor (RIA). Committed to prioritizing clients' needs, the firm offers a flexible, sophisticated, and transparent approach to financial planning.

Guided by a foundation of integrity, empathy, and innovation, Wellington Wealth Strategies steers clients across the nation toward a lifetime of financial success. Their team of advisors, boasting over 100 years of combined experience, are strategically positioned throughout the United States, with headquarters in Indianapolis and satellite offices in Crown Point and Fort Wayne, Indiana.

For more information about Wellington Wealth Strategies and its comprehensive financial planning services, please visit WellingtonWealthStrategies.com.

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