

# Research

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## profiles **IN** SUCCESS

Relyea/Zuckerberg/Hanson LLC

### Teamwork Works

*Working together, James Relyea, Carl Zuckerberg and Dana Hanson are the perfect planner.*

BY JANE WOLLMAN RUSOFF



(From Left to Right)  
Carl Zuckerberg, James Relyea  
and Dana Hanson

Certainly, for the past two years the market has been pretty much hell on earth. However, for a team of three astute certified financial planners in Stamford, Conn., this time has bordered on heavenly — the best of their careers.

Relyea/Zuckerberg/Hanson LLC, launched in March 2000, are wealth managers in super-upscale Fairfield County, Conn., and Westchester, N.Y. And their all-for-one (the firm), one-for-all (their clients) thrust is what's brought them not only bushels of referrals but media accolades too. The advisory this past July, for instance, was ranked 40th nationwide and No. 1 in Connecticut among Bloomberg's Top [Independent] Wealth Managers. RZH manages \$150 million in assets; its average client is worth \$10 million to \$12 million. Every year the firm limits new accounts to no more than 20.

For years, James F. Relyea, Carl J. Zuckerberg and Dana A. Hanson worked as a team at another financial planning firm before opening their own shop, affiliated with Commonwealth Financial Network. The three managing directors and equal owners complement one another when it comes to individual expertise. But what sets this triumvirate apart is its synergistic single-mindedness.

"We like to say that the three of us working together are the perfect planner. Clients see that this dynamic is

