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RZHadvisors

RZH ANNOUNCEMENT

WELCOMING NEW TEAM MEMBERS

Dear RZH Community,

At RZH Advisors, we believe that our clients are at the heart of everything we do. We are dedicated to consistently exceeding your expectations and remain committed to helping you embrace life to the full extent of your wealth.

In pursuit of our mission, we are thrilled to introduce three new exceptional team members who have joined our firm in the last 18 months. We are confident these talented individuals will help us bolster our wealth management offering and help ensure outstanding client service and experience.

To strengthen our team we have hired the following individuals who bring a wealth of expertise and a passion for client success to RZH. We are proud to introduce:

Brendan McEwan, Senior Financial Advisor, CFP®

Brendan is a seasoned financial advisor who joined us in March 2022, after relocating to Connecticut with his wife and young daughter. Brendan brings more than twelve years of experience working with high-net-worth individuals and families, celebrities, and professional athletes. Brendan's passion is to help clients understand complex financial topics.

At RZH, Brendan works closely with Carl and Spencer to develop our comprehensive financial plans and has been instrumental in educating our younger clientele as we embark on the single largest generational transfer of wealth in our lifetime.

Brendan is also an avid rower and competes at the Head of the Charles Regatta in Boston every year! We are thrilled to have Brendan on our team, and for those who haven’t met him yet, we’re looking forward to making an introduction very soon!

Jean Paul Atallah, Chief Operating Officer and Chief Compliance Officer

Absorbing the roles and responsibilities of business operations and compliance formerly overseen by Carl, Spencer, and Dana (before her retirement), Jean Paul joined RZH in June 2022, to consolidate these responsibilities into one department. By centralizing our operations, compliance, accounting and human resources obligations, Carl and Spencer have increased the bandwidth dedicated to our clients and their holistic wealth management needs.

Jean Paul brings more than ten years of experience in optimizing operations for large wealth management firms. He has been instrumental in fine-tuning our operations and ensuring that all our systems, resources and team members have the tools and technology needed to work efficiently and create lasting impressions with our clients.

Jean Paul is proud of his Lebanese heritage; he speaks fluent Arabic and as a life-long resident of Connecticut, remains actively involved in the large and vibrant Lebanese community in Greater Waterbury.

Rita Levon, Client Service Associate

Rita is the newest member of the RZH team, joining us in March 2023. With more than ten years of financial services and banking experience, Rita is responsible for supporting the RZH partners and financial advisors by coordinating the needs of our clients.

Prior to joining RZH, Rita was a client service associate at Union Savings Bank and Newtown Savings Bank. Her best trait is her ability to connect with people; she looks forward to building lasting relationships with our clients. She is detail-oriented and will assist Susan and Candice with various client servicing needs.

Rita is a Connecticut native, growing up in Danbury. In her spare time, she loves spending time outdoors with her two children and enjoys going to the beach, hiking, gardening, and practicing yoga.

Looking Forward to the Future

Brendan, Jean Paul, and Rita have demonstrated that they share our core values and are committed to upholding our company's principles of exceptional client service. We are confident that their combined experience and dedication will leave a lasting impression on all RZH clients.

Before we look forward to the future, we would be remiss not to express our heartfelt gratitude and thanks to our existing team members who have contributed immensely to our success. Their unwavering commitment and hard work have been instrumental in achieving our goals, and we look forward to accomplishing even more together.

RZH Advisors remains laser-focused on client service, maintaining strong relationships, and pursuing new opportunities. To that end, we have been working diligently to incorporate new internal technologies and processes, allowing us to optimize and streamline the operational side of our business. We believe that we have some of the most cutting-edge technology in the marketplace, freeing us from operational burdens and allowing us to bring you enhanced client experiences and offerings.

Our most recent initiative is the onboarding of a state-of-the-art Client Relationship Management ("CRM") system that will empower us with a holistic Client 360 approach. This new CRM works with our existing technology to automate certain administrative tasks, giving us more time for client interactions. We are excited about the future and confident that our expanded team and enhanced technology will greatly benefit our clients.

And finally, to our cherished clients, thank you for your ongoing trust and support during these increasingly volatile market cycles. RZH Advisors would not be the firm we are today without your support, and we look forward to many, many more years of continued partnership.

Best regards,

Carl and Spencer

Important Disclosure Information

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