

Welcome Emerald Asset Advisors' clients, friends, and associates!

We are delighted to announce that SlateStone Private Client, LLC has completed its merger with Emerald Asset Advisors, LLC, combining two highly experienced and dedicated teams focused on delivering every possible advantage to our clients.

As we embark on our new journey together, SlateStone Private Client, along with its affiliate investment advisor, SlateStone Wealth, LLC, are uniquely positioned to provide unparalleled client care. Importantly, we are thrilled to welcome our new advisors and partners, Robert Levin and Troy Sorel, and our new associates Denise Karp and Suzie Dean, your seasoned team of dedicated professionals. Together, our partnership allows us to leverage organizational and operational efficiencies, while enhancing our services via a broader range of optional investment offerings and a greater depth of investment research, management and financial planning talent.

Furthermore, we are excited about our continuing strategic partnership with the leadership at EMFO, LLC and its Co-Founder and Chief Strategic Officer, Scot L. Hunter and Co-Founder and Chief Executive Officer, Allan M. Budelman. By aligning with one another, both professionally and personally, we are well-positioned to utilize our extensive network of clients, business partners and friends of the firm to solve problems and deliver solutions that make a difference.

On behalf of the now expanded SlateStone family and our partners, we welcome you to our firm and dedicate our efforts to building one of the most client-centric firms in our space. As always, we sincerely appreciate your loyalty and confidence and are pleased to serve you at SlateStone, "Where Partnerships Build Legacies."

SlateStone's Leadership Team



Sherri A. Daniels  
Co-Founder, Managing Partner



Patrick E. Tylander  
Co-Founder, Managing Partner



David J. Costigan  
Managing Partner