STRAUSS
WEALTH MANAGEMENT

Independence Powered By LPL Financial

Craig R. Strauss, MBA, AIF®, AAMS®, CRPS®, CLTC
LPL Financial Advisor

FOR IMMEDIATE RELEASE

Strauss Honored as Five Star Wealth Manager for Sixth Straight year

February 2018

(Newburyport, MA)…..For the sixth straight year, Craig R. Strauss, MBA, AIF®, AAMS®, CRPS®, CLTC, of Strauss Wealth Management was recently recognized in Boston Magazine as a Five Star Wealth Manager, a distinction awarded to less than 19% (for 2018) of wealth managers in the Boston metropolitan area.

Five Star Professional, a third-party research firm, collects nominations from peers and firms, including financial planners and advisors, CPAs, and estate planning attorneys. Self-nominations are not accepted. The award is based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Wealth managers do not pay a fee to be considered or placed on the final list of 2013, 2014, 2015, 2016, 2017 and 2018 Five Star Wealth Managers. After review by a panel of local industry experts and a review of regulatory history, Five Star Professional determines the final list of Five Star Wealth Managers.

"I have focused on providing personal service, innovative strategies and objective guidance for the past 15 years, and it is an honor to be recognized for those efforts," says Strauss. "Being named as a Five Star Wealth Manager for the sixth straight year demonstrates my commitment to placing my clients' best interest first and helping them gain confidence in their financial future."

Strauss graduated Wakefield High School in 1981 and obtained both a Bachelor's of Science degree in Business Administration and an M.B.A from Northeastern University. He is an LPL Registered Representative, an LPL Investment Advisor Representative, an ACCREDITED INVESTMENT FIDUCIARY℠ designee, a CHARTERED RETIREMENT PLANS SPECIALIST℠ designee, an ACCREDITED ASSET MANAGEMENT SPECIALIST℠ designee, holds the CLTC (Certified in Long-Term Care) designation, and maintains his Series 6, 7, 63 and 66 state securities registrations held through LPL Financial and insurance licenses in Massachusetts, New Hampshire and Maine.

Strauss has over 30 years of financial industry experience starting as a Financial Analyst at Bolt Beranek & Newman from 1986 to 1993 in Cambridge, then as Director of Finance at Fidelity Investments Institutional Services (Advisor Division) from 1993 to 2001 in Boston. After serving as

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U.S. Controller for Forrester Research in Cambridge, Strauss started and managed the Edward Jones Investments office in Wakefield, MA from 2002 to 2010 before founding Strauss Wealth Management in 2010 as President and affiliating with LPL Financial, the nation's largest independent brokerage firm (according to *Financial Planning* magazine, June 1996-2017, based on total revenue).

Strauss is a member of the Financial Planning Association of Massachusetts and Newburyport Chamber of Commerce. He resides in Newburyport with his wife Mary Beth and daughters, Elizabeth and Katie.

Strauss Wealth Management is an independent wealth management services firm providing objective guidance and planning strategies to individuals, families and small businesses to help them pursue their long-term financial goals. For more information, visit www.strausswealth.com. Strauss Wealth Management is located at 37A Pleasant Street, Suite 8, Newburyport, MA 01950. Strauss can be reached by phone at (978) 465-4000 or by email at craigs@strausswealth.com.

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