



MONECO Advisors Adds Eleven Existing Advisors to Partnership

FAIRFIELD, Conn., July 7, 2023 – MONECO Advisors LLC, (monecoadvisors.com), has expanded their partnership ranks by eleven, bringing the firm's total partners to 18.

MONECO has long adopted a “for advisors, by advisors” mentality, where the advisors at the firm have been just as integral in running the business as they are executing on client's financial plans. This expansion of their partnership is a further alignment of the work the firm's advisors were already undertaking with the firm's future success.

“We feel the industry is undergoing massive change in how firms are structured to foster multigenerational relationships with clients. By expanding our partnership ranks, we are creating a new ecosystem to provide smooth succession planning while also developing the next generation of advisor to become equity partners.” added Derrek Metz, a Managing Partner at MONECO. “By solving the equity question, we can all focus on what matters most: serving our clients both now and well into the future.”

Charlie Rocco, a Managing Partner at MONECO, said, “We are determined to build a team that embodies our commitment to our culture, clients, advisors and staff. Our feeling is that if you own something you are going to be that much more committed to those guiding principles. Our expanded partnership only helps the alignment with our vision and allows us to maintain our core mission of putting ‘clients first, always.’

The newest partners of the firm are:

- Colleen Galushko
- Chris Neubert (who is our founder and was previously a partner)
- Dana Preis
- Eric Johnson
- Jason Hyde
- Joanna Russell
- Peter Osborne
- Reed Ameden
- Rudy Weiss
- Salim Boutagy
- Scott Flynn

2150 Post Road | Fairfield, CT 06824 | Phone: 203.319.3550 | Fax: 203.319.3554 | monecoadvisors.com

Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through MONECO Advisors, LLC, a registered investment advisor and a separate entity from LPL Financial.



Together with existing partners, John Rosenau, Ginnie Thompson, David Lincoln, Charlie Rocco, AJ Kelleher, Derrek Metz & Todd Schroeder, creates a new 18-person partnership group.

About MONECO Advisors, LLC

MONECO Advisors was founded in 1980 at a time when transactions ruled, and clients' best interests were often lost in the shuffle. Since its inception, the team at MONECO always felt that clients deserved more. The firm was built to provide a truly client centric approach: In-depth financial planning that puts each client's needs, priorities and goals at the center of its relationships. MONECO's robust team consists of fourteen CERTIFIED FINANCIAL PLANNER™ professionals, two Accredited Investment Fiduciaries™, two Certified Investment Management Analyst® designees, four MBAs and two advisors with their Juris Doctorate, to help clients meet their increasingly complex financial planning needs.

Media Contacts

Charlie Rocco

2150 Post Road, Fairfield CT, 06824

Phone: 203.319.3550

charlie@monecoadvisors.com

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