MONECO ADVISORS

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# Pittsfield Massachusetts Based Willow Joins the MONECO Advisors Team

**FAIRFIELD, Conn., January 6, 2024** - MONECO Advisors, LLC (monecoadvisors.com), recently announced the acquisition of Willow, a financial planning and investment management firm based in Pittsfield, MA. This acquisition will expand the resources that Willow has at their disposal, giving their team increased flexibility and a greater ability to assist their clients.

When Willow initially set out on their due diligence process to select the right partner, they sat down with 47 firms, to ensure that their independence, as well as their client relationships would not be impacted in any way, other than gaining the depth and breadth of a larger firm and team. “Our industry is becoming more complex with compliance and administration that brings additional layers of complications, expenses and process,” stated Alexandra Renders, Founder & CEO at Willow. “This set us out on a journey to find the perfect partner and my team and I felt very strongly that an acquisition by MONECO Advisors was the right move for our clients and our team,” said Renders.

“When we look to partner with other firms in the Wealth Management space, it isn’t about the size and scope of the opportunity, it is about finding firms that have a true alignment with our cultural values and how we work with clients,” said Charlie Rocco, Managing Partner at MONECO.

While MONECO has no long-term plan to seek out other acquisitions across the country, focusing on strategic moves within the northeast is part of the firm’s long-term vision.

“When we initially met with MONECO, we immediately felt a mutual connection, in the way both firms always put the client first, investment philosophies and the emphasis on long term financial planning,” stated Paul Farella, Managing Director at Willow and now Partner at MONECO. Along with Alexandra and Paul, Allison Loring, Compliance & Operations Manager and Christine Simeone, Client Services Manager also joined the collective MONECO team. Allison and Christine will assist with mission critical tasks when it comes to compliance and client service on a day-to-day basis.

**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

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