

Two Generations, One Vision: A Family's Approach to Wealth Management

Wealth Advisor Team Profile



Carol Nulman
Managing Director,
Principal



Richard Lewis, AIF®
Managing Director,
Principal



Hunter Norte, CFA®
Vice President



Megan Grandmaison
Vice President

! Situation Analysis

After three decades of experience at various banks and independent firms, Carol Nulman started a search for what would be her final move. Her son, Richard Lewis, has many decades left in his career so together they weighed near term capabilities to serve their sophisticated client base with future growth potential. They wanted a collaborative culture that encouraged idea-sharing and provided access to broader investment, planning, and philanthropic resources. They found an environment that offered the right balance of autonomy, support, and opportunity—giving them confidence in the long-term growth of their practice and its eventual transition to the next generation.

@ Rationale & Goals

- Align with a firm whose culture values collaboration, independence, and shared expertise.
- Access deeper investment, generational planning, and philanthropic resources to better serve clients.
- Organizational structure that promotes long-term value growth for equity holders
- Build a foundation for smooth succession within their family practice.
- Continue delivering personalized, high-touch advice with the backing of institutional-quality resources.
- Join a forward-thinking firm with the flexibility to grow and evolve alongside client needs.

📈 Results & Outcome

- Joined a collaborative network of advisors focused on shared growth and client success.
- Expanded capabilities through access to private markets, planning tools, and family office capabilities.
- Strengthened client relationships by cementing transition plan.
- Promotion of team growth through access to firm wide training programs
- Contributed to the firm's broader Northeast expansion, bringing new expertise and leadership to the region.
- Leveraged firmwide resources and cross-team collaboration to deliver holistic, customized solutions for clients.