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# LASSUS WHERLEY

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*Peapack Private Wealth Management*

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**FOR IMMEDIATE RELEASE**

## **Cynthia Fusillo Completes Chartered Special Needs Consultant® Certification Requirements**

New Providence, NJ (March 2020) – Cynthia Fusillo, MBA, CPA, ChSNC® and Wealth Advisor at Lassus Wherley, a Subsidiary of Peapack-Gladstone Bank, has been authorized by the The American College of Financial Services to use the Chartered Special Needs Consultant® designation. Cynthia joined Lassus Wherley in 2006. As a Wealth Advisor Cynthia is responsible for tax planning and preparation. She works with other advisors in the preparation of financial plans to help individuals and families take control of their financial affairs and have the peace of mind that comes from knowing they have laid the groundwork for a more secure financial future. Our firm encourages credentials to enhance our advisors' ability to meet the increasingly complex and broad-based needs of our clients.

The ChSNC® designation teaches experienced financial professionals the technical and collaborative skills necessary to help clients make plans for the future security of a loved one who has special needs. Designees must adhere to The American College's Code of Ethics, which includes the following professional pledge: "I shall, in light of all conditions surrounding those I serve, which I shall make every conscientious effort to ascertain and understand, render that service which, in the same circumstances, I would apply to myself." ChSNC® professionals also agree to meet ongoing continuing education requirements.

The American College, an accredited non-profit educational institution with a heritage dating back to 1927, confers the ChSNC®. The College has a full-time faculty of industry experts and is the leading educator of financial professionals in the United States.

### **ABOUT LASSUS WHERLEY**

Lassus Wherley was founded in 1985 by Diahann W. Lassus, CFP®, CPA/PFS and Clare E. Wherley, CPA, CFP®. The company has two offices to serve clients, one in New Providence, NJ, and the other in Bonita Springs, FL. We assist individuals, couples, families, pension and profit sharing plans, trusts, estates, and charitable organizations in identifying their needs, desires and goals. Lassus Wherley exists to bring peace of mind to clients, helping them build better futures by providing a wide range of wealth management services, including financial planning, investment management, tax preparation, and trust services.

### **ABOUT PEAPACK-GLADSTONE FINANCIAL CORPORATION**

Peapack-Gladstone Financial Corporation is a New Jersey bank holding company with total assets of \$5.2 billion and assets under management and/or administration of \$7.5 billion as of December 31, 2019. Founded in 1921, Peapack-Gladstone Bank is a commercial bank that provides innovative private banking services to businesses, non-profits and consumers, which help them to establish, maintain and expand their legacy. Through Peapack Private Wealth Management, and its private banking locations in Bedminster, Gladstone, Fairfield, Morristown, Princeton, Teaneck, New Providence, and Summit its trust office in Greenville, Delaware, Peapack-Gladstone Bank offers an unparalleled commitment to client service through its private wealth management, commercial private banking, retail private banking and residential lending divisions, along with its online platforms.

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Neither rankings and/or recognitions by unaffiliated rating services, publications, media or other organizations, nor the achievement of any designation or certification, should be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if Lassus Wherley is engaged, or continues to be engaged, to provide investment advisory services. Rankings published by magazines and others, generally base their selections exclusively on information prepared and/or submitted by the recognized adviser. No ranking or recognition should be construed as a current or past endorsement of Lassus Wherley by any of its clients. **ANY QUESTIONS:** Lassus Wherley's Chief Compliance Officer remains available to address any questions regarding rankings and/or recognitions.