

ASCENT WEALTH PARTNERS

To Our Clients and Friends:

There are a lot of great things happening at Ascent these days, we thought we'd share a few!

Recognized as a "Top 25 Financial Planning & Wealth Management Firm"

Ascent was recently named by the Albany Business Review as a "Top 25 Financial Planning & Wealth Management Firm" in the 2017 Book of Lists. This recognition comes on the heels of our 2016 naming to the Financial Times "300 Top Registered Investment Advisers" list.



Saratoga Office Ribbon Cutting

The Saratoga County Chamber of Commerce visited the new Saratoga Springs office to celebrate the opening of our newest location with a ribbon cutting ceremony. This event coincided with our 6 Year Anniversary.



View more photos here: [INSTAGRAM](#) or [FACEBOOK](#)

Joe Summa obtains CFA Charter

Joe Summa, one of our Managing Directors in the New Hartford office, recently passed the third and final exam of the highly accredited Chartered Financial Analyst (CFA) program. Joe is now the third CFA Charterholder in our firm. Our bench of talent continues to strengthen and grow. Congratulations Joe!



Sincerely,

Handwritten signature of Mark Moshier in black ink.

Mark Moshier, CPA
Partner

Handwritten signature of Bradley M. Kowalczyk in black ink.

Bradley M. Kowalczyk, J.D., LL.M
Partner

Handwritten signature of Scott C. McCartney in black ink.

Scott C. McCartney, CFA
Partner

89 Genesee Street, New Hartford, NY 13413
☎ 315.624.7300

16 Lake Avenue, Saratoga Springs, NY 12866
☎ 518.306.4220

1225 W. Water Street, Suite 1, Elmira, NY 14905
☎ 607.734.2002