



PRESS RELEASE

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Pension & Wealth Management Advisors Adds Serpa as Managing Partner and Co-President

Waltham, MA – June 15, 2021 – [Pension & Wealth Management Advisors](#) (PWMA) adds David J. Serpa as Co-President and Managing Partner of the firm.

Serpa brings with him nearly 25 years of executive experience driving business transformation and maximizing shareholder value in the management consulting and M&A industry. He has worked with both large multi-national clients and the private industry.

Prior to joining the firm, he served as Managing Director at Mentor Partners, where he led the Management Consulting/M&A Advisory practice while evaluating investment opportunities for the Private Equity division. He also served PRTM Management Consultants (now PWC) where he conducted operational & technology due diligence, business process outsourcing, and developed business strategies in support of corporate clientele and private equity mergers and acquisitions. As Co-President of the firm Serpa will be responsible for launching Pension Wealth Mergers & Acquisitions LLC, a strategic partnership operating as a separate entity in support of the firm's Wealth Management and Asset Management capabilities.

George P. Webb, CEO and Managing Partner of PWMA, said “We're very excited to have David on board. His breadth of experience, knowledge and leadership capabilities will complement our growing team of seasoned executives.”

About Pension & Wealth Management Advisors (PWMA):

[Pension & Wealth Management Advisors](#) is a Registered Investment Advisor with the U.S. Securities and Exchange Commission. PWMA provides advisory expertise in Wealth Management, Asset Management, and Institutional Advisory services to help clients optimize their investment opportunities. Learn more at www.pensionwealth.com

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