



PRESS RELEASE

FOR IMMEDIATE RELEASE  
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## **Pension & Wealth Management Advisors Introduces New partnership to Advise Clients on Mergers and Acquisition.**

Waltham, MA – September 8, 2021 – [Pension & Wealth Management Advisors](#) (PWMA), in responding to client demand, announced today the launch of a new strategic M&A Advisory partnership to its already impressive resume of Wealth Management capabilities.

“Adding an M&A Advisory partnership compliments our suite of wealth management services and allows us to seamlessly continue to partner with our clients as they enter the next cycle of their careers,” said George Webb, CEO of Pension & Wealth.

The firm recently added David Serpa as Managing Partner to launch Pension Wealth Mergers & Acquisitions LLC, and manage the much anticipated strategic partnership. His 25 years of executive experience driving business transformation and maximizing shareholder value in the Management Consulting and M&A industry will help fuel the growth of the partnership.

“During an M&A process there are dozens of strategic and tactical issues that must be managed; as advisor’s, Pension Wealth Mergers & Acquisitions LLC. will manage the entire life cycle of the process to assure that these issues are managed to the best of our client’s interest,” said Serpa. “I’m excited to join the team and help build an amazing M&A Advisory partnership.”

### **About Pension & Wealth Management Services:**

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](http://www.pensionwealth.com)

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