



CT-BASED PROCYON PARTNERS DOUBLES DOWN IN THE BIG APPLE: ADDS VETERAN FINANCIAL ADVISOR STEVEN MITCHELL IN NYC

Steven Mitchell Advised on over \$2 Billion in Client Assets

St. Petersburg, FL —July 28, 2020—CT-based Procyon Partners today announced the hiring of veteran financial advisor Steven Mitchell.

Based in NYC, Mr. Mitchell was most recently a Managing Director of Wealth Management at UBS where he worked since 2008. With thirty years of experience, Mr. Mitchell previously advised on over \$2 Billion in client assets. Prior to this new hire, Procyon Partners has a total of \$3 billion in assets under advisement.

Mr. Mitchell focuses on providing investment advice for ultra-high net worth families, both their private and institutional assets. His specialties include retirement, financial planning and lending capabilities of all types and structures.

“Joining Procyon will enable me to advise my clients on more opportunities than ever before because of the overall platform. I am so excited for this next chapter in my career with Procyon and the Dynasty network. I have always been intrigued with being an independent advisor and believe Procyon gives me the best opportunity to add that ultimate value for my clients,” said Mr. Mitchell.

“At Procyon, we pride ourselves on hiring very talented people who can add value to the services and resources we provide to clients – not expanding for the sake of expansion. Steven is a perfect example of that as he has focused his entire career on solving problems for the ultra-wealthy private client. He brings a wealth management and lending expertise that will expand the services and resources that Procyon’s Private Wealth group specializes in,” said Procyon Partners CEO Phil Fiore, “We plan to continue this theme of expansion and will be making additional announcements in the near future.”



Bio

Steven Mitchell is a veteran financial advisor with thirty years of experience working in financial services. Most recently, he was a Managing Director, Global Wealth Management at UBS. He began working at UBS in 2008. Prior to that, he was a Private Wealth Advisor & Senior Vice President at Lehman Brothers from 1991-2008. He graduated from Syracuse University—Maxwell School with a B.A. in Economics.

Mr. Mitchell will join financial advisor Jim Jeffrey at Procyon's New York City offices at 300 Park Avenue.

Based in Shelton, CT and New York City, Procyon Partners is an independent Registered Investment Advisor (RIA) with a dual focus on retirement plan/participants and private clients. Procyon Partners is a Dynasty Financial Partners Network firm.

About Procyon Partners

Based in Shelton, CT and New York City, Procyon Partners is an independent Registered Investment Advisor (RIA) with a dual focus on retirement plan/participants and private clients. On the institutional side, the firm helps companies and organizations design, manage and enhance their retirement plan offerings while also educating plan participants on how to effectively prepare for their retirement. As a private wealth advisor, Procyon helps high net worth individuals, families and business owners identify and implement the most effective financial strategies for managing their investments and achieving their financial goals. For more information, please also visit www.procyonpartners.net.