



Carnegie Investment Counsel

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PRESS RELEASE

Carnegie Investment Counsel announced today its expansion into Florida with the hiring of Winifred M. Coleman as Vice President/Portfolio Manager. She joins Carnegie from the Stifel Nicolaus office in Sarasota, FL and will be based in Englewood, FL.

“Having Winnie on board adds depth to our portfolio manager team and is part of a long-term strategic plan to expand our services into Florida,” says Gary Wagner, Principal of Carnegie. “Her experience and dedication to providing objective advice fits well with our model. We anticipate this to be the beginning of substantial growth in the market.”

Coleman brings a client base of around \$38 million AUM to the firm. She adds, “Carnegie’s custom approach, independence and experienced team were exactly what I wanted. While I could have struck out on my own, the support and infrastructure made the decision to join Carnegie nearly impossible to turn down.”

Headquartered in Beachwood, Ohio, Carnegie Investment Counsel is a fee-only investment management and planning firm managing over \$265 Million for individuals, families, foundations and endowments.

For more information, visit www.carnegie-capital.com or email gwagner@ccamc.com