



David Peltz Promoted to Chief Executive Officer at Joel Isaacson & Co.

Will partner with Joel Isaacson to lead the prominent wealth advisor

New York, NY – February 12, 2020 – Joel Isaacson & Co. LLC (“JICO”), a leading wealth management advisor specializing in financial planning, investment management and tax strategies, announced today that David Peltz was promoted to Chief Executive Officer of JICO, effective February 1, 2020. Joel Isaacson, founder of JICO, will continue as Chairman, guiding the leadership team, working with clients and mentoring advisors as the company continues to grow.

Peltz has been with JICO for eighteen years, and was made a partner in 2012. In addition to his primary role as a wealth advisor, Peltz will assume additional management and leadership responsibilities as CEO, supported by a team of tenured professionals at the firm. Peltz is also a board member and treasurer of The Possibility Project, a not-for-profit organization which uses community action and the performing arts to empower teenagers to take positive actions in their lives and communities.

Isaacson and his partners founded JICO in 1993. Today the firm is ranked as one of the top wealth advisors in the U.S. by Barron’s, The Financial Times, Accounting Today, Forbes Inc., Worth Magazine and many other publications. Isaacson is considered a pioneer and leader in the industry and has served on the National Board of Directors of the National Association of Personal Financial Advisors, and is frequently quoted by the *Wall Street Journal*, *New York Times*, *Business Week* and *Fortune*. He also serves as Chairman of the Board of AHRC New York City Foundation.

“I am thrilled to appoint David as CEO, this is the next step in the growth of our business,” said Isaacson. “David enables us to expand our leadership team based on a set of shared values, with no disruption to our clients. He embodies outstanding client service and has been integral to growing our reputation as a market leader. I know he will do a great job in his new role and I am excited about JICO’s future under our shared leadership.”

“I am honored to assume the role of CEO,” said Peltz. “There is no better time to lead JICO. We have a deep bench of advisors with long tenure at the firm. This tremendous team of people will help us to capitalize on the many opportunities we have before us for the benefit of our clients. I look forward to serving my clients as I always have, while maintaining a close working relationship with Joel and our Partners Stan Altmark, Marty Stein, Lee Steinmetz and Robert Paul, along with all our talented employees.”

About Joel Isaacson & Co. LLC

Joel Isaacson & Co. LLC (“JICO”) is a leading wealth management advisor based in New York City. JICO serves high net worth individuals and families, as well as business owners, executives and entrepreneurs looking to grow their wealth through a combination of sophisticated planning, investment management and integrated tax strategies. The firm works on a fee-only basis to support its sole objective of helping its clients grow and protect their wealth. JICO is a partner firm

of Focus Financial Partners Inc, a leading partnership of independent, fiduciary wealth management firms. For information on JICO, please visit www.joelisaacson.com.

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