

NEWS

For Immediate Release

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Fidato Wealth Introduces New Managing Director and Financial Advisors

In addition, the comprehensive wealth management firm was included in Financial Advisor Magazine's 2023 RIA Rankings

MIDDLEBURG HEIGHTS, OH (November 1, 2023) – [Fidato Wealth](#), an independently owned and operated fiduciary financial advisory firm located in Middleburg Heights, Ohio, recently announced the addition of three professionals to the team:

- Eric Pucek, Managing Director and Chief Compliance Officer (CCO)
- Dave Flegal, CPA, CFP®, Lead Wealth Advisor
- Dan Yergan, CFP®, Associate Wealth Advisor

“We’re very excited to have these three professionals join our growing team at Fidato Wealth,” said Tony D’Amico, CFP®, Founder and CEO of Fidato Wealth. “They’re already proving to be great additions to our firm and are making significant contributions in how we serve our clients comprehensively.”

ABOUT ERIC PUCEK, MANAGING DIRECTOR AND CCO

Eric Pucek is Fidato Wealth’s Managing Director and Chief Compliance Officer (CCO), where he is responsible for managing and overseeing several areas at the firm, including compliance, IT and cybersecurity, finance and accounting, and human resources. Pucek’s background and experience provides Fidato Wealth with a unique perspective on how the firm can continue to provide best-in-class client service to families and businesses throughout continued firm growth. He is passionate about the responsibilities of fiduciaries and has spent his career ensuring fiduciary standards were upheld in his prior roles.

Before joining Fidato Wealth, Pucek was a partner at Ativo Capital Management, LLC in Chicago, serving as COO and CCO during his tenure. Prior to joining Ativo, he worked at UBS Global Asset

Management (Americas) Inc., where he ultimately was promoted to Director with the title of Senior Compliance Officer. He acted as the compliance lead in the firm's Chicago office and managed a team of compliance officers in that location. Prior to joining UBS, Pucek was a Securities Compliance Examiner and Staff Accountant for the Broker-Dealer Examination Program in the Chicago Regional Office of the U.S. Securities and Exchange Commission (SEC). He received the Shannon D. Ayers Examination Award of Excellence during his tenure at the SEC.

Pucek received his Bachelor of Science in Accountancy and Master of Accounting Science from the University of Illinois. He is an Illinois Registered Certified Public Accountant (CPA), Certified Fraud Examiner (CFE ®), Investment Adviser Certified Compliance Professional (IACCP®), Series 65 Registered, and Completed Level 1 of the CFA Program.

ABOUT DAVE FLEGAL, CPA, CFP®, LEAD WEALTH ADVISOR

Dave Flegal is a Certified Public Accountant and CERTIFIED FINANCIAL PLANNER™ Professional who brings knowledge and experience to Fidato Wealth in his role as a Lead Wealth Advisor. While Flegal is technically minded and process oriented, his real passion is forming relationships with clients and helping them align their values with their finances.

Flegal's primary role at Fidato Wealth is leading client relationships and helping to enhance the tax planning services offered to Fidato clients. His experience as a CPA helps him integrate tax planning into client's financial plans, ensuring they pay as little tax as legally possible over their lifetime.

Flegal was born and raised in Akron, Ohio and graduated from Baldwin Wallace University with an MBA and BA in Finance and Accounting.

ABOUT DAN YERGAN, CFP®, ASSOCIATE WEALTH ADVISOR

Dan Yergan serves as Associate Wealth Advisor at Fidato Wealth, where he specializes in providing exceptional advisory services to both existing and prospective high-net-worth clients. Through collaboration with the Fidato Wealth advisory team, he is responsible for ensuring that clients progress with their individualized wealth planning goals and are connected with a professional network of attorneys, accountants, and other specialists to help advance their wealth plan.

Yergan was born and raised in Youngstown, Ohio and graduated from Youngstown State University with a bachelor's degree in business administration. Upon graduation, he earned his CERTIFIED FINANCIAL PLANNER™ marks and went on to obtain a master's degree in personal financial planning from Kansas State University. He earned additional graduate certificates in financial therapy and advanced financial planning along the way. Prior to his time at Fidato Wealth, he served as a back-office financial planner for advisory firms across the country.

To learn more about all three new team members, as well as the rest of the Fidato Wealth team, [please click here](#).

FIDATO WEALTH NAMED TOP ADVISORY FIRM BY FINANCIAL ADVISOR MAGAZINE

In addition, Fidato Wealth was recently listed in [Financial Advisor Magazine's 2023 RIA Survey and Ranking](#), listing the top 521 Registered Investment Advisory firms in the U.S. by assets under management (AUM). The firm ranked #454 in the list of largest RIAs (up 9 spots from the 2022 rankings), with year-end 2022 assets totaling over \$270M. Fidato Wealth has been included in the *Financial Advisor* RIA rankings every year since 2017.

Rankings are compiled by AUM, and discretionary and nondiscretionary AUM are sourced from the firms' Form ADVs. To see *Financial Advisor Magazine's* full RIA rankings, [please click here](#).

ABOUT FIDATO WEALTH

Fidato Wealth is a financial advisory firm headquartered in Middleburg Heights, OH, that provides retirement planning, family wealth management, and business advisory services. As an SEC Registered Investment Advisor, the firm is legally bound to act as a fiduciary, which means that clients' needs always come first. Tony D'Amico, CFP®, Founder and Managing Partner, has been quoted in *The Wall Street Journal*, *CNBC*, *Barron's*, and other national publications. Fidato Wealth has been named to *Financial Advisor Magazine's* Top RIA Rankings every year since 2017. For more information, visit www.FidatoWealth.com.

Fidato Wealth LLC is an SEC Registered Investment Adviser. Advisory services are only offered to clients or prospective clients where Fidato Wealth LLC and its representatives are properly licensed or exempt from licensure. Past performance is no guarantee of future returns. Investing involves risk and possible loss of principal capital. No advice may be rendered by Fidato Wealth LLC unless a client service agreement is in place.

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