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Fidelis Capital Welcomes Douglas Rothermich as Partner and Wealth Strategist

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Rothermich oversaw all high-net-worth planning for TIAA and directly advised clients holding over \$1 billion in assets; he brings three decades of experience serving ultra-high-net-worth clients and institutions to Fidelis Capital.

TAMPA, Fla., June 24, 2024 /PRNewswire/ -- Fidelis Capital, an advisor-owned wealth management firm dedicated to addressing the complex investment and planning needs of ultra-high-net-worth (UHNW) clients and institutions, announced today that Douglas Rothermich, J.D., has joined the firm as its newest Partner and Wealth Strategist.



Doug Rothermich is a respected industry authority on the integration of wealth transfer, estate, and tax planning services. At Fidelis Capital, he will use his decades of experience addressing the intricate needs of generational wealth to develop comprehensive plans for clients' tax, retirement, asset accumulation, and long-term planning goals, all of which are fully integrated with the firm's uniquely customized investment solutions.

"Our growth as a firm is targeted at adding the right people, with the right experience, and the right character, to deliver the sophisticated client service that led us to establish Fidelis Capital. Today, we are proud to welcome just such an individual in Doug as our newest Partner and Wealth Strategist. Given his robust expertise and proven track record serving UHNW clients, Doug is a natural fit within our team and is already an invaluable asset," said **Rick Simonetti, Founding Partner, CEO and Head of Wealth Planning at Fidelis Capital.**

Doug previously served as Vice President of Wealth Planning Strategies at TIAA-CREF (now TIAA), where he oversaw wealth transfer, estate, and tax planning services, and directly advised clients holding over \$1 billion in assets. There, he also served as a Director of the TIAA Life Insurance Company and its donor advised fund, TIAA Charitable. Prior to TIAA, he practiced law at Bryan Cave, LLP, a national and international law firm, where he advised UHNW clients on estate planning and matters involving closely held business interests. Before this, he served as Vice President and Senior Trust Counsel at Boatmen's Trust Company (now Bank of America), where he was responsible for legal matters pertaining to business in several Midwestern states.

Doug received his law degree cum laude in 1992 from St. Louis University School of Law and is a 1984 graduate of the University of Missouri, St. Louis, where he received his Bachelor of Arts degree in Business Administration with an emphasis in Finance and Economics.

"Having worked in senior management and led the wealth planning line of business for a \$1 trillion firm, by joining Fidelis Capital, I'm uniting with partners who share a similar depth of experience in their respective fields, where integrity and ethical behavior are intrinsic values," **said Doug Rothermich, J.D., Partner and Wealth Strategist at Fidelis Capital.** "Our clients have access to an entire team with the breadth and expertise to tailor every service to each family and their unique planning story. That is contrary to many of the largest firms in the industry, where customization is rare and there are established, unnecessary constraints, no matter the amount of money invested."

"Cultivating a team of industry leaders is essential to our mission at Fidelis Capital. We couldn't be more thrilled to welcome Doug to our respected roster of leaders across the investment and planning disciplines," **said Matthew Ellis, CPWA®, Founding Partner and President at Fidelis Capital.** "Doug's depth of experience and genuine dedication to client success perfectly aligns with our values and vision for the future. His addition not only strengthens our ability to deliver exceptional service but also reinforces our commitment to innovation and excellence."

About Fidelis Capital

Fidelis Capital is an advisor-owned wealth management firm dedicated to addressing the complex investment and planning needs of ultra-high-net-worth individuals, families, and institutions. With over 425 years of combined experience serving this clientele, Fidelis Capital delivers a white glove, team-based approach to wealth management. By coordinating, clarifying, and simplifying their financial affairs, our team helps clients enjoy more of what money can't buy – time. Founded by former private bankers from Wells Fargo and Bank of America, Fidelis Capital is the first wealth management firm started by principals from rival institutions and has offices in Charlotte, North Carolina; Dallas, Texas; Greenwich, Connecticut; St. Louis, Missouri; Tampa, Florida; and Washington, D.C. For more information, visit www.fideliscapital.com.