

Dakota Wealth Management Acquires C2C Wealth

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Dakota Wealth Management →

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Strategic acquisition adds a third Massachusetts office for the firm

PALM BEACH GARDENS, Fla., Jan. 2, 2024 /PRNewswire/ -- Dakota Wealth Management, an independent investment management firm serving high net worth individuals and families, has entered into an agreement to acquire C2C Wealth Management, LLC, an SEC registered investment advisory firm managing approximately \$350 million in Mansfield, MA. The firm also advises on an additional \$550 million of client assets.

Founder Louis Delle Valle and client services associate Carol Donnelly will join Dakota.

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"We value the importance of elevated strategic planning and understand the imperative for integrated tax services."

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"It is a rare occurrence to encounter an individual who specializes in providing strategic counseling to families with complex needs," said Peter Raimondi, Founder and CEO, Dakota Wealth Management. "Mr. Della Valle and I value the importance of elevated strategic planning and understand the imperative for seamlessly integrated tax services."

Client service and advice will remain the top priority for both companies throughout the transition.

"My business has been growing rapidly, and I needed to evaluate if I wanted to build out the infrastructure and add personnel or find a partner with those things already in place that can help maintain my growth trajectory," said Della Valle. "That why I chose Dakota."



The transaction marks the fourth Dakota has announced since June 1. Previous transactions include Stillwater Investment Management in June, Jonathan D. Pond LLC in September, and JMG Wealth Management Group in November.

This is the third Massachusetts office for Dakota Wealth Management. The Palm Beach Gardens, Fla.-based firm now has 14 offices in 9 states.

Mr. Della Valle founded C2C Wealth Management in 2016 in partnership with advisor Maureen Mackowski after breaking away from independent broker-dealer LPL Financial. Mackowski has since retired.

Dakota Wealth Management was launched in May 2018 to deliver a transformational wealth management experience dedicated to creating multi-generational wealth and success for clients and partners. Since its founding, Dakota Wealth Management has grown assets under management both organically and through strategic acquisitions.

About Dakota Wealth Management

Dakota Wealth Management is an independent investment management, wealth and estate planning, and full-service tax planning firm serving high-net-worth individuals, families, and institutions. Headquartered in Palm Beach Gardens and founded by RIA industry veteran Peter Raimondi, Dakota elevates wealth management to an art with thoughtfully designed investment portfolios and personalized wealth management services. Dakota also provides a full suite of financial planning, estate and tax services for selected clients. For more information, visit www.dakotawm.com.



Thrilled to announce Dakota Wealth Management's acquisition of C2C Wealth Management, LLC, an SEC registered investment advisory firm managing approximately \$350 million in Mansfield, MA. The firm also advises on an additional \$550 million of client assets.



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