



June 1, 2021

Aaron Zauner Joins Caldwell Group, LLC Wealth Management in Brentwood, Tennessee

BRENTWOOD, TN – [Winthrop & Co.](#) is proud to formally announce that Aaron Zauner has joined [Caldwell Group, LLC Wealth Management](#), an independent firm aligned with LPL Financial, one of the nation's leading independent broker-dealers.

After a 15-year career at Fidelity, Aaron made the leap to independence to provide his clients with a more tailored, relationship-driven experience. Known for his thoughtful approach to financial planning and deep client relationships, Aaron brings with him a highly engaged practice of over 200 households, with an average account balance north of \$1.4MM.

Aaron shared, “After years in the corporate environment, I realized I needed a platform that was as committed to my clients as I am. Caldwell Group offers the flexibility, mentorship, and resources to do what I do best—build lasting relationships and deliver truly personalized advice.”

His move to Caldwell Group is not just about change, but about alignment—finding a firm that shares his vision for long-term client success.

A dedicated advisor since 2005, Aaron specializes in comprehensive wealth management strategies for individuals, families, and small business owners. His move underscores a broader trend of seasoned advisors leaving large institutions in search of greater autonomy and deeper client impact.

*Official Press Release of Winthrop & Co.
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