



November 16, 2024

Jason S. Fitz, CFP™ Launches Laurentide Wealth, an Independent Financial Practice with Commonwealth

NEW YORK, NY – [Winthrop & Co.](#) is proud to announce the launch of [Laurentide Wealth](#), founded by Jason S. Fitz, a seasoned private wealth advisor who brings over two decades of financial industry experience to his independent practice. The firm operates under [Commonwealth Financial Network](#), one of the nation’s premier independent broker-dealers.

Jason’s transition from Lincoln Financial Advisors signals a purposeful move toward greater control, flexibility, and personalized client service. After years of fielding overtures from wirehouses and large platforms, Jason opted for a more strategic fit—one that aligned with his long-term vision, supported his deep planning expertise, and didn’t revolve around a recruiting check.

“I wasn’t looking to be sold—I was looking to build something meaningful for the clients who trust me,” said Jason. “Commonwealth gives me the platform and support to do exactly that.”

Prior to founding Laurentide Wealth, Jason spent a decade at Lincoln Financial Advisors/Sagemark Consulting, where he became part of the elite Private Wealth Services division. His earlier career included roles at Equitable Advisors, Merrill Lynch, and five years at Goldman Sachs Asset Management, where he managed institutional relationships overseeing more than \$2 billion in assets.

At Laurentide Wealth, Jason and his team serve high-net-worth individuals, families, and business owners with a comprehensive suite of services, including fee-based planning, asset management, risk strategies, estate planning, and multi-generational wealth guidance. As a CERTIFIED FINANCIAL PLANNER™ professional, Jason is committed to delivering highly tailored strategies rooted in trust and transparency.

Jason graduated from the University of Pennsylvania and Phillips Exeter Academy. He lives in Armonk, NY, with his wife, Katarina, and their two daughters, Neve and Hope.

With the launch of Laurentide Wealth, Jason enters a new chapter—one focused on independence, excellence, and a client experience defined by personalization and enduring partnership.

*Official Press Release of Winthrop & Co.
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