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## **Michael Voltin, CFP®, CPWA® Leaves Merrill Lynch to Join Wealth Partners Alliance on the Concurrent Platform**

**AUSTIN, TX** – Winthrop & Co. is proud to announce that Michael Voltin, CFP®, CPWA® has joined [Wealth Partners Alliance](#), a leading independent firm operating on the [Concurrent Investment Advisors](#) platform, with brokerage services offered through [Purshe Kaplan Sterling Investments \(PKS\)](#).

With over 11 years of experience in wealth management, Michael made the move from Merrill Lynch to independence to deliver more tailored strategies and expand the depth of resources available to his clients. His decision to join Wealth Partners Alliance reflects a desire to serve clients with greater flexibility, transparency, and planning precision.

Michael holds both the Certified Financial Planner™ (CFP®) and Certified Private Wealth Advisor® (CPWA®) designations, and works closely with families, corporate executives, and business owners to create comprehensive wealth plans. His areas of focus include tax-efficient strategies, investment management, retirement planning, and estate design—all centered around his belief in long-term relationships built on trust and customization.

Originally from Dallas, Michael is a graduate of the University of Texas and has called Austin home for several years. He began his career with AXA Advisors before spending six years at Merrill Lynch as a Wealth Management Advisor and Assistant Vice President.

Outside of the office, Michael enjoys spending time outdoors with his wife Courtney and their daughter Charley, and taking in the live music scene that makes Austin one of a kind.

With the move to Wealth Partners Alliance, Michael is positioned to deliver the highly customized, deeply personal financial experience that today's clients deserve—backed by the scale and support of a modern hybrid-RIA platform.

*Official Press Release of Winthrop & Co.  
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