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Local Firms Join Forces as Marble Trail Financial

MIDDLEBURY — Two financial-service firms in Middlebury’s Marble Works are coming together to create Marble Trail Financial, which blends asset management and planning with certified public accounting to offer the most complete service package of its kind in the area.

Since 2010, principals Don Devost and Matt Wootten of Addison Advisors have brought a personalized, holistic approach to helping area residents manage their assets and achieve their financial goals. They’ve formed the new venture with Steve and Louise Misasi, whose firm Misasi & Company CPAs dates to 2004 and has offices in both Middlebury and Dorset.

“This meets a strong demand among our clients, for a one-stop shop,” said Devost. “No one else in the area is providing such a full range of financial services.”

“We’ve been collaborating with the folks at Misasi for several years,” Wootten added — “and on every occasion, we’ve recognized that the value we can create by working together is larger than the sum of our individual parts.”

“Whenever we have melded our investment and tax planning strategies, we have delivered exceptional outcomes,” Steve Misasi agreed. “Our mutual efforts have included tax-efficient retirement income strategies, business transition consulting, tax-preferred college savings approaches, gifting strategies, and retirement savings plans.

“By making this formal alliance,” Wootten said, “we can leverage our fields of expertise to provide an expanded, holistic offering of services for any and all clients who might benefit.”

Marble Trail Financial aims to serve community members of all means, and Devost said it offers two key advantages. “The first is timeliness. Investment advisors and accountants must do a myriad list of things on a timely basis, and we need to work closely together. Being in the same office facilitates that.

“The second advantage is planning,” Devost said. “Taxes should be part of holistic financial planning — and it’s not just about planning; we’re offering end-to-end services. For small business owners and sole proprietors, we can cover the spectrum of needs, from payroll and bookkeeping to 401k plans for employees and tax returns for the business owners. That gives you peace of mind, so you can focus on your business.”

Marble Trail Financial is named “for the rock-solid marble corridor that runs beneath our communities,” said Steve Misasi. His CPA firm began in the Dorset-Manchester area, then expanded into Middlebury in 2006 when they bought the long-standing local company Miller, Deverell & Co. The former principals of that firm, Walter Deverell and Walter Miller, continue to work part-time for Misasi and Company.

“We could only go so far in tax and financial planning without the asset management piece,” Louise Misasi noted. “For our clients, this new venture completes the picture.”

For more information, visit marbletrail.com or call 802 989-7584.

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