FIELDPOINT PRIVATE®

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BNY Mellon Team Managing $900 Million Heads to Fieldpoint Private

Joe Fernandez and Christina Hudson to Establish Firm's Beachhead in Miami/Coral Gables

Greenwich, CT – September 10, 2020 – Fieldpoint Private, the fast-growing wealth advisory and private banking boutique serving families and institutions, announced that the Miami area-based advisory team of Joe Fernandez, Christina Hudson and Johanna Arbelaez-Perez has joined the firm. The team's move marks an important expansion in Fieldpoint's Florida presence, which also includes teams in Orlando/Winter Park and Palm Beach.

Mr. Fernandez spent 28 years with BNY Mellon Wealth Management, and for the last six years served as the firm's Florida region president, and as a member of the firm's senior leadership team. Ms. Hudson spent 22 years at BNY Mellon, working with some of the firm's largest and most complex relationships. Prior to that, she spent five years with SunTrust (now Truist) as a portfolio manager and asset/liability specialist. The team managed roughly $900 million in client assets, working with approximately 75 families.

Mr. Fernandez and Ms. Hudson are joined by Johanna Arbelaez-Perez, a long-time colleague and 20-year BNY veteran who will serve as the team's Associate.

Their decision was grounded in a determination to provide independent, objective advice to their client families, according to Ms. Hudson. "Our clients are entitled to our best thinking, without competing agendas or biases," she said. "That's the soul of Fieldpoint, and it was key to our decision to come here."

Mr. Fernandez added that integration of a full-service private bank within Fieldpoint Private was a critical part of their decision. "Fieldpoint operates at a human scale, yet its ability to advise and problem-solve for clients across both sides of the balance sheet, including all aspects of their businesses and lives, is extraordinary," he said. "Here, Christina and I can advise on everything that matters, without holding back because of gaps in the solutions we can deliver."

"Christina, Joe and Johanna are a significant presence in Florida and they had the opportunity to join any firm they wished," said Christopher DeLaura, Fieldpoint's Director of Wealth Management and

President and CEO of Fieldpoint Private Securities. "We're honored that they chose Fieldpoint Private, and that they did it for the right reasons – for their clients."

About Fieldpoint Private
Headquartered in Greenwich, Connecticut, Fieldpoint Private (www.fieldpointprivate.com) is a boutique financial firm providing the highest degree of personalized, confidential wealth planning and private banking services. Catering to highly successful individuals, families, businesses and institutions, Fieldpoint Private offers a powerful combination of wealth management and strategy, family office, private banking and business banking services addressing every financial need for each of our clients including: wealth transfer advice, tax planning, aggregation and performance reporting, risk management, goals-based investing strategies, sophisticated investment selection, discreet and personalized banking, highly customized credit solutions, custom custody and trust solutions, highly attentive/responsive service and concierge services.

Fieldpoint Private was established in 2008 by 31 Founders with a specific vision and purpose. These extraordinary leaders of industry and community recognized the opportunity to create a financial firm totally attuned to people's individual circumstances. Our firm is built on a philosophy of exclusive membership and client-centricity. Working with a limited number of relationships gives every person the experience of belonging to an extremely selective group. The result is a new breed of institution established on the basis of personalization, responsiveness, and exclusivity, and an ensured commitment to impeccable service and consistently flawless execution. Our service approach offers a unique client experience custom crafted to each client's financial needs.

Banking Services: Fieldpoint Private Bank & Trust
Registered Investment Advisors: Fieldpoint Private Securities, LLC, is a SEC Registered Investment Advisor and Broker Dealer. Member FINRA, SIPC.

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