

Casco Bay Wealth Advisors Completes The First Year of Its Charitable Giving Program

Portland, ME (November, 2015) – Today, Casco Bay Wealth Advisors (CBWA) announced that the first year of its charitable giving program, ***CBWA Investing In The Community***, came to a successful completion. The program is designed to financially assist local non-profit organizations selected by the partners of the firm. Each of the six partners selects one organization per year to receive a donation. The following six organizations benefited from the program this year:

Mid Coast Hunger Prevention Program – Brunswick, ME
The Nature Conservancy – Maine Chapter
American Lung Association – Maine Chapter
Fryeburg Rescue Bicycle Helmet Giveaway – Fryeburg, ME
Maine Huts & Trails – Kingfield, ME
Animal Refuge League of Greater Portland – Portland, ME

Mary Holmes, one of the founders of CBWA, says, “We are committed to our communities and the non-profit organizations that serve them. We are pleased that we are in a position to assist these organizations.” In addition to their financial contribution program, CBWA employees and their families regularly volunteer in the community. Recently, CBWA donated over 40 hats to Chemo Caps for Kids that several in the group had hand knit. The hats go to pediatric cancer patients in Maine and Massachusetts, including The Patrick Dempsey Center for Cancer Hope & Healing.

CBWA was founded in December, 2013 by six Financial Advisors that were previously with Northeast Financial Services (Norm Poulin, Christian Bishop, Kevin Carbin, Mary Holmes, Leslie Couper, and Stephen Goldsmith). Their firm’s name reflects their comprehensive focus on helping to manage all aspects of their clients’ financial life, including retirement planning, risk management, estate planning, taxation and business planning. Combined, the six principals of Casco Bay Wealth Advisors have 125 years of financial industry experience.

CBWA has offices in Portland, Brunswick, Lovell and Auburn.

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