

Casco Bay Wealth Advisors Continues Their Community Involvement

Brunswick, ME (April, 2015) – Today, Casco Bay Wealth Advisors (CBWA) announced that their charitable giving program, ***CBWA Investing In The Community***, recently made a donation to the Maine Chapter of the Nature Conservancy (TNC) based in Brunswick, ME. The donation was at the TNC’s “Cadillac” level, which made CBWA a member of the Corporate Conservation Council of Maine. The Nature Conservancy states their mission, as follows:

The mission of The Nature Conservancy is to preserve the plants, animals, and natural communities that represent the diversity of life on Earth by protecting the lands and water they need to survive.

CBWA Investing In The Community 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. In addition to these financial contributions, CBWA partners and employees regularly support the community in other ways, as well.

In that regard, CBWA also announced that they will host an American Red Cross blood drive in their Brunswick office from 10:00 am until 3:00 pm on Tuesday, April 28, 2015. Kevin Carbin, one of the founders of CBWA, says, “The American Red Cross relies on the generosity of volunteer donors to be everyday heroes to patients in need. We are proud to support their efforts.”

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, as well as satellite meeting offices in Augusta and Bethel.

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