

FOR IMMEDIATE RELEASE
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GYL Financial Synergies Names Melissa Ciotoli & Rachel Gelb as Firm Partners

Ciotoli & Gelb to Support Next-Gen Client Experience and Business Initiatives

West Hartford, CT — GYL Financial Synergies, an independent registered investment advisory firm with offices in West Hartford and Westport, CT, announced today that effective June 30, 2021, Melissa Ciotoli CFP®, CDFA and Rachel Gelb, SHRM-CP will become partners. Both women have played a pivotal role in elevating the client experience and positioning the firm for the future. As partners of GYL Financial Synergies, they will take on a greater degree of management responsibility. Melissa will lead efforts to further standardize and bolster the firm’s financial planning offerings to clients, and Rachel will spearhead the ideation and implementation of standard operating procedures that will streamline the firm’s delivery and execution for its clientele.

“GYL was founded on one guiding fiduciary principle: our clients’ interests come first,” says Gerald B. Goldberg, the firm’s CEO & co-founder. “Melissa continues to demonstrate her knowledge and expertise in delivering for several of our high-net-worth private clients, and Rachel has been at the epicenter of our transformation from a small business to a scalable and growing business enterprise. They have both proven themselves as leaders and valued team members, and they were clear choices for partnership.”

Melissa’s core responsibilities have involved assisting several of the firm’s high-net-worth private clients in achieving their objectives, advising on asset allocation, investment management, and financial planning. Prior to joining the firm in 2017, Melissa worked in financial planning and wealth advisor roles at Barnum Wealth Management, Price Financial Group, and Morgan Stanley Smith Barney. Melissa holds the CERTIFIED FINANCIAL PLANNER™ designation and is a Certified Divorce Financial Analyst® practitioner.

“Melissa brings a wealth of industry experience and subject matter expertise on a variety of subjects to the team, including holistic financial planning,” says Goldberg. “Her dedication to her clients, work ethic, and integrity will serve her well as a partner.”

Prior to joining GYL in 2016, Rachel worked in Human Resources for Hartford HealthCare. In this role, she was a plan administrator for one of its hospital's retirement plans and managed the organization's defined benefit and defined contribution plans. At GYL, Rachel was responsible for creating the firm's HR department and has been heavily involved in several key initiatives, including building out operational workflows for several departments, firm-wide technology updates and office closure/reopening during the COVID-19 pandemic, as well as the 2019 merger between GYL Financial Synergies and Resnick Advisors. Rachel holds the SHRM-CP designation.

“One of the most important capital resources we manage as a firm is human capital, and Rachel personifies grace under pressure,” Goldberg says. “Rachel will continue to be the point person mapping out what our firm should be doing to support team members who, in turn, are crucial to enhancing the client experience.”

ABOUT GYL FINANCIAL SYNERGIES

GYL Financial Synergies, LLC is an independent registered investment advisory firm with \$4.7 billion of assets under management and \$3.5 billion of assets under advisement as of December 2020. GYL Resnick provides wealth management and discretionary and/or non-discretionary investment management to individuals and high-net-worth individuals. GYL Financial Synergies provides institutional consulting and discretionary and/or non-discretionary investment management services to institutions and retirement plans. GYL Financial Synergies is a part of [Focus Financial Partners](#), a leading partnership of independently managed wealth management firms. Learn more about GYL Financial Synergies at www.gylfinsyn.com.