



**Trio of Veteran Financial Professionals Launch
Cerro Pacific Wealth Advisors, Overseeing \$450M in Client Assets**

Partners Daniel K. Speirs, Lyle L. Meek, and Jennifer L. Chesini Bring More than 80 years of Combined Investment Management and Financial Planning Experience to Independent Firm

SAN LUIS OBISPO, Calif.—Oct. 16, 2020—Founding partners Daniel K. Speirs, Lyle L. Meek and Jennifer L. Chesini announced the launch of Cerro Pacific Wealth Advisors, a San Luis Obispo-based, multi-generational wealth management firm. Overseeing \$450 million in client assets, the firm focuses on long-term, liquid asset investment.

All three partners have worked with one another for years and will bring a team approach to client service.

“Though the financial services world has evolved, we still believe that a long-term approach is the best way to build enduring wealth,” said **Lyle Meek, Founding Partner of Cerro Pacific Wealth Advisors**. “After much discussion, my partners and I decided that we could be of even greater service to our clients by creating an independent firm. Now we are accountable to only one group of people—our clients.”

Most recently, the three partners worked together at Wells Fargo Advisors. Speirs and Meek have worked alongside each other serving their respective clients for the past 19 years, collaborating on strategies and portfolio construction. Chesini initially met Lyle through a college internship and joined in partnership with him three years ago after a successful career in the San Francisco Bay area.

“While we all had successful careers working under a large institution, we ultimately decided that we could do more for our clients as an independent team,” said **Jennifer L. Chesini, CFP®**, **Founding Partner of Cerro Pacific Wealth Advisors**. Now, we have more freedom to share our expertise, collaborate on solutions and keep our focus where it belongs on serving our clients.”

In addition to the three partners the new firm also includes veteran financial professionals Meredith K. Collins and Brianna M. Ferguson, CFP®.

“As a multi-generational team, it’s important for clients to feel confident that we’ll be there to support them throughout their financial lives and well into the next generation,” said **Daniel K.**



Speirs, Founding Partner of Cerro Pacific Wealth Advisors. “When clients work with us, they’ll have peace of mind that goes along with building long-term relationships with fiduciaries who will provide advice that’s always within their best interests.”

Cerro Pacific Wealth Advisors delivers personalized, insightful financial planning and advice with a focus on stable, long-term investing. From creating a financial plan to selecting and managing investment portfolios, Cerro Pacific Wealth Advisors partners with clients throughout every stage of their financial lives.

As the firm’s third-party custodian of client assets Cerro Pacific Wealth Advisors has chosen Fidelity InstitutionalSM. Fidelity Institutional provides a comprehensive clearing and custody platform, brokerage services, trading capabilities, and practice management and consulting to registered investment advisors (RIAs), including strategic acquirers and professional asset managers, as well as retirement recordkeepers, broker-dealer firms, banks, and insurance companies.

“Lyle, Jenni and Dan have rallied around a collective mission of helping clients with a focus on the long term and their move to independence positions them to continue to deliver on that while also aligning around the long-term vision for their firm,” said **David Canter, head of the registered investment advisor and family office segments for Fidelity Institutional.** “We are excited to welcome the Cerro Pacific team to the Fidelity platform and look forward to supporting their continued growth as an independent firm.”

About Cerro Pacific Wealth Advisors

Located on California’s Central Coast, Cerro Pacific Wealth Advisors (<https://www.CerroWealth.com>) is a team of financial professionals with more than 80 years of collective professional experience providing investment advice, portfolio construction and financial planning. A fee-only, independent registered investment advisory firm, Cerro Pacific Wealth Advisors adheres to the fiduciary standard, providing counsel that is in the best interests of its clients.



*Fidelity Investments and Fidelity Institutional (together “Fidelity”) is an independent company, un-affiliated with Cerro Pacific Wealth Advisors. Fidelity is a service provider to Cerro Pacific Wealth Advisors. There is no form of legal partnership agency affiliation, or similar relationship between Cerro Pacific Wealth Advisors and Fidelity, nor is such a relationship created or implied by the information here-in. Fidelity Institutional provides clearing, custody, or other brokerage services through National Financial Services LLC or Fidelity Brokerage Services LLC, Members NYSE, SIPC. 948947.1.0

Cerro Pacific Wealth Advisors, LLC is a Registered Investment Adviser. Advisory services are only offered to clients or prospective clients where Cerro Pacific Wealth Advisors, LLC and its representatives are properly licensed or exempt from licensure. Past performance is no guarantee of future returns. Investing involves risk and possible loss of principal capital. No advice may be rendered by Cerro Pacific Wealth Advisors, LLC unless a client service agreement is in place.