

Cornerstone Wealth Advisors, Inc. Strengthens Leadership to Guide Multi-Generational Wealth Management

For Immediate Release - Trinity, FL and Denver, CO – January 2025 – Cornerstone Wealth Advisors, Inc., an independent wealth management and financial planning firm, announces the promotion of Michael Quattrochi, CFP® and Chase Walker, CIMA® to Partners. This move solidifies the firm's commitment to supporting the significant transfer of wealth projected over the coming decades and ensuring the continued success and care of its multi-generational client base in the areas of comprehensive financial planning and investment management (for individuals, families, and business owners).

As the financial industry anticipates an \$84 trillion wealth transfer through 2045 ([via research firm Cerulli Associates](#)), Cornerstone Wealth Advisors positions itself at the forefront of this shift. With over 41 years of experience, the firm combines seasoned expertise with fresh, innovative leadership to serve clients locally in Trinity and Denver metropolitan area, and across 33+ additional states. “Our team cares tremendously about our clients, and the work we do to help them maximize their Return on Life,” said Chase Walker, Partner. “Our partnership expansion is a commitment to preserve and develop the legacy of Cornerstone Wealth Advisors, so that we can serve our current and future generations of clients for decades to come.”

Michael Quattrochi, who joined the firm in April 2021, brings a wealth of experience as a Certified Financial Planner® (CFP®) of which 6% of designation holders are under the age of 30. His leadership has been instrumental in driving the firm's growth and deepening client relationships. When asked about the future of the firm, Michael shared: “I’m thrilled that our firm is connecting with the next generation of investors by offering advice from professionals who understand their life stage, while also drawing on decades of experience from our Managing Partner. This ensures our clients receive guidance that’s specific to their life season and managed by a team, not just one individual.”

Chase Walker, a Certified Investment Management Analyst® (CIMA®), has been pivotal in advancing the investment management function of the brand for individuals, families, and business owners, since his arrival in October 2022. Together, Michael and Chase embody the firm's mission to deliver personalized, results-driven financial solutions.

Chuck Walker, CFP®, AIF®, Founder and Managing Partner, expressed his excitement for the firm's future: “We are thrilled to welcome Mike and Chase as partners. Their expertise, dedication to excellence, and shared vision for the future of Cornerstone Wealth Advisors make them invaluable members of our leadership team. As partners,

they will play an integral role in driving our firm’s mission of empowering clients to achieve financial independence.”

The promotions reflect Cornerstone’s strategic initiative to blend seasoned insights with innovative strategies, ensuring that both existing and future clients continue to receive the highest level of service. This leadership expansion positions Cornerstone Wealth Advisors to navigate the evolving financial landscape, particularly as it relates to generational wealth management.

About Cornerstone Wealth Advisors, Inc.

After getting his start in the industry in 1983, Chuck Walker, CFP®, AIF® founded Cornerstone Wealth Advisors, Inc. in 1994 in Trinity, FL. Today, the firm is dedicated to providing tailored wealth management solutions that help clients achieve their “Best Return on Life.” With a client base spanning 33 states, the firm prides itself on offering personalized advice and innovative solutions that address the unique needs of each individual and family. Specific service areas include:

- Comprehensive Financial Planning
- Investment Management for Individuals, Families, and Business Owners

Cornerstone Wealth Advisors, Inc. has two physical offices, located in Trinity, FL and the Denver metropolitan area.

For more information, visit www.returnonlife.us.

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