

**FOR IMMEDIATE RELEASE**

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## **Westport Strategies to Merge with CapAcuity**

**LAKE MARY, FLORIDA (JULY 17, 2019)** — CapAcuity, LLC and Westport Strategies, LLC (Westport) today announced that they have signed a definitive agreement to merge their operations.

“We are very excited to have the Westport team join forces with us,” CapAcuity CEO Peter Cahall said. “They are one of the preeminent firms in the executive benefits marketplace, with over \$2.5 billion in assets under management. Their staff, systems, technology, and client base will be important assets to our combined business.”

“Combining our companies is a significant event for the marketplace and for our clients,” said Westport Managing Director Don Harrington. “CapAcuity has become a leader in executive benefits by identifying and responding to the trends that are fundamentally changing our business—new tax laws, reduced investment product costs, and greater demand for transparency. And they are addressing these trends with cutting-edge solutions that materially benefit plan sponsors and their bottom lines.”

The two companies have complementary service offerings. Both companies work exclusively in the executive benefit marketplace, with expertise in funding and hedging, tax optimization, and asset management. “Importantly, CapAcuity and Westport share the same values of objectivity, transparency, and high-touch client service,” Cahall said.

CapAcuity Chief Operating Officer Bryant Kirk noted that “like CapAcuity, Westport’s professionals have decades of experience and expertise. They have built proprietary systems for evaluating and delivering cost-effective funding solutions and asset-liability management. Plan sponsors, consultants and advisors trust Westport, which is why they have built a large and loyal client base.” Kirk emphasized that Westport’s Albany and Boston-based teams will not change and will provide seamless continuity of services to their clients.

“By leveraging CapAcuity’s innovations and thought leadership, we’ll be able to offer our clients a broader suite of services, and drive efficiencies for even more companies,” said Westport Managing Director Scott Seibel.

## **About CapAcuity**

CapAcuity stands apart from other companies in the executive benefits marketplace. With our team of experts, we bring a new perspective to the Executive Benefit Supply Chain™. Through our comprehensive consulting, investment advisory and asset management services, we help our clients respond effectively to the latest trends impacting their executive benefit plans. We have developed proprietary analytics and technologies for optimizing tax, funding, and hedging strategies, which enable us to drive cost efficiencies and effectively manage our innovative solutions. The result is dramatically improved financial results for plan sponsors, and enhanced retirement outcomes for plan participants. Learn more at [capacuity.com](http://capacuity.com).

*CapAcuity, LLC is an SEC-registered investment advisor. Securities offered by CapAcuity Securities, Inc., member FINRA. CapAcuity, LLC; CapAcuity Consulting, LLC; and CapAcuity Securities, Inc. (collectively referred to as “CapAcuity”) are affiliated entities.*

## **About Westport Strategies**

Westport enables public and private companies to effectively fund and hedge the liabilities associated with their executive benefit programs. Our services include the rigorous review and management of all existing funding strategies. And with our proprietary platform, we evaluate, implement, and administer new, potentially more cost-effective alternatives. Westport is comprised of some of the nation’s most respected consultants and financial analysts—professionals who have been providing executive benefit services to America’s leading companies for over 30 years. Our team, our history and our experience have made us a recognized leader in the non-qualified executive benefit plan marketplace, with over \$2.5 billion in assets under management.

*Westport Strategies Advisors, LLC is an SEC-registered investment advisor. Securities are offered through FAS Corp. an SEC Registered Broker Dealer and Member of FINRA. FAS Corp. is an affiliate of Financial Advisory Service, Inc.*