

Welcome to Crestwood Advisors!

Dear former Endurance Wealth Management client,

I wanted to personally welcome you to Crestwood Advisors and to thank you for choosing to continue your relationship with the team of Endurance Wealth Management! The past few months have been a busy time for everyone and we are so grateful for the efforts of Mike Costello and the team to successfully juggle the sometimes challenging logistics of preparing to join Crestwood without diluting the outstanding service you have come to expect from them.

When we were first introduced to Endurance in the early Spring of 2022, it was abundantly clear that Mike and the team had built a terrific organization that really cared for clients, many of whom they worked with for decades. Following this introduction, we spent much time comparing notes about our firms, exploring the challenges we were seeking to overcome and our shared goals of further enhancing the experience and outcomes for our clients. As these informal discussions continued, it became clear that combining our energies and efforts would improve the future success for our clients and the sustainability of our firms.

As we carefully evaluated how such a combination could be achieved, we spent much time deepening the interpersonal relationships of our broader teams, which only created greater enthusiasm for what resulted in our eventual merger. Both leadership teams came to believe that by combining our strengths and expertise, we would together be able to deliver even more comprehensive investment and wealth management solutions that will benefit our clients.

We are excited to welcome Mike into the leadership of Crestwood as one of our five Managing Partners and are eager to leverage his deep experience to help steer Crestwood into our shared future. In the months ahead, we will be working hard to integrate various technology platforms and systems. We hope that most of these efforts will remain invisible to you and that those that are noticeable will be welcomed and provide an enhanced experience.

I will look forward to the opportunity to meet you personally in the future and, while the team with whom you work will continue to serve you, I invite you to contact me directly with any questions or concerns that you may have.

Again, thank you and welcome to Crestwood Advisors!

Michael A. Eckton, CFA
CEO & Managing Partner
meckton@crestwoodadvisors.com
Direct: 617-226-0070
Cell: 617-794-5159

cc: J. Michael Costello, CFA