ASHTON THOMAS
PRIVATE WEALTH

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FORMER WELLS FARGO PRIVATE BANK REGIONAL CIO, MICHAEL SERIO, JOINS ASHTON THOMAS AS DIRECTOR OF WEALTH MANAGEMENT

SCOTTSDALE, ARIZONA (March 4, 2021) – Ashton Thomas Private Wealth has named Michael Serio, CFA®, CAIA®, MBA Director of Wealth Management. Mr. Serio will be reporting directly to firm CEO, Aaron Brodt, CIMA®.

Mr. Serio was previously Regional Chief Investment Officer (CIO) with Wells Fargo Private Bank. In that role, Mr. Serio covered the Mountain Northwest, a region with advisor teams managing in excess of $49 billion. Prior to his seven-year tenure with Wells Fargo, Mr. Serio held Managing Director roles with JP Morgan and Citigroup. Earlier in his career, he served as portfolio manager for two established asset managers.

Mr. Serio's primary focus at Ashton Thomas will be ensuring consistent delivery of high-quality advice to firm advisors and clients. He will also provide market and economy commentary in conjunction with the firm's Asset Allocation and Advanced Planning teams and represent the firm in the media and professional associations.

"Adding Mike to the team rounds out our support structure for elite advisor teams," states Aaron Brodt. "His experience and perspective will be invaluable as we continue to build on the strong foundation we have established. Our advisors and their clients will have the opportunity to tap into a consummate financial professional with a decorated career who is accessible and approachable."

Throughout his career, Mr. Serio has been quoted in The Wall Street Journal, The New York Times, Bloomberg, and The Washington Post. He has served as an adjunct professor at The University of Denver and DePaul University, and has taught CFA Review courses for prospective Chartered Financial Analyst® (CFA®) exam candidates for twelve years. Mr. Serio became a Chartered Financial Analyst® in 1991 and received his Chartered Alternative Investment Analyst® (CAIA®) designation in 2003. He received his MBA from DePaul University Chicago.

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About Ashton Thomas Private Wealth
Ashton Thomas Private Wealth is a diversified financial advisory firm committed to a culture of excellence, integrity and respect in every aspect of its business. Its advisors serve foundations, business entities and affluent individuals and families through fee-based financial planning and investment portfolio management, retirement plan consulting and related financial education programs. The firm also strives to remain at the forefront of technological innovation and thought leadership within the financial services industry.

Ashton Thomas is headquartered in Scottsdale, Arizona.