Aug 17, 2026 10:00 AM Eastern Daylight Time

Maridea Wealth Management Acquires Park Ridge Financial, Expanding Chicago Presence

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Founder Rick Pucci brings a full-service, personalized approach to financial planning to Maridea's Chicago office

BROOKLYN, N.Y.--(BUSINESS WIRE)--Maridea Wealth Management ("Maridea") today announced the acquisition of Park Ridge Financial, Inc. ("Park Ridge Financial"), a Chicago-based advisory firm recognized for providing full-service, personalized financial planning — including investment management, retirement strategies, and estate conservation — to individuals, families, and business owners. Maridea established its presence in the Chicago market in September 2025, and the Park Ridge Financial team will join Maridea's existing Chicago office, bringing the two practices together under one roof.

Rick Pucci, founder of Park Ridge Financial, will join Maridea as Senior Investment Advisor. Pucci, who has led Park Ridge Financial for more than seventeen years, has built his practice around personalized, full-service financial planning, helping individuals, families, and business owners align their investment, retirement, and estate strategies with their long-term goals.

"We are incredibly excited to welcome Rick to Maridea," said Mier Wang, Founder and CEO of Maridea. "He has built an outstanding business by investing in great people, fostering a strong culture, and achieving consistent growth. His momentum and professionalism make him a natural fit for Maridea, and this partnership supports our long-term goal of continuing to deepen our presence in Chicago."

Park Ridge Financial's clients will continue to work with the same Chicago-based team and will gain access to Maridea's proprietary tax services, expanded

investment research capabilities, and broader planning infrastructure.

“Rick has spent more than seventeen years earning the trust of families and business owners across the Chicago area, and that is exactly the kind of practice we want to build alongside,” said Brian Sheehy, Senior Investment Advisor of Maridea’s Chicago office. “Bringing our teams together under one roof gives clients a deeper bench in their own market — the same local relationships they have always had, now backed by the research, tax, and planning resources of a national firm.”

“I’m excited to join Maridea at a time of strong momentum and growth,” said Pucci. “Maridea’s high-growth trajectory, entrepreneurial culture, and long-term vision were key factors that attracted my team and me to this partnership. By coming together, we’re able to expand the planning and retirement solutions we provide while continuing to deliver exceptional service to clients.”

About Maridea Wealth Management

Maridea Wealth Management is an SEC-registered investment advisor providing integrated financial, investment, tax, and business-advisory services to individuals, families, and business owners nationwide. With eight offices and more than 50 professionals overseeing approximately $1.8 billion in assets under management and administration, Maridea delivers a comprehensive wealth-management experience built around long-term relationships, thoughtful planning, and high-touch service.

To learn more, please visit marideawealth.com

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Industry: Personal Finance Finance Asset Management Consulting Banking Accounting Professional Services Business

MARIDEA WEALTH MANAGEMENT

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Maridea Wealth Management Welcomes River Cities Financial Services and Dietz, Futrell & Walters Insurance, Establishing First Ohio Presence

BROOKLYN, N.Y.--(BUSINESS WIRE)--Maridea Wealth Management (“Maridea”) today announced that River Cities Financial Services, Ltd. (“River Cities Financial Services”) and Dietz, Futrell & Walters Insurance, Inc. (“DFW Insurance”), two affiliated firms based in Marietta, Ohio,...

Maridea Wealth Management Acquires Pultro Financial Management, Establishing First Pennsylvania Presence

BROOKLYN, N.Y.--(BUSINESS WIRE)--Maridea Wealth Management (“Maridea”) today announced the acquisition of Pultro Financial Management (“PFM”), a New Britain, Pennsylvania-based independent wealth management practice in the Philadelphia area,...

Maridea Wealth Management Acquires Ashford Investment Advisors, Establishing First Florida Practice

BROOKLYN, N.Y.--(BUSINESS WIRE)--Maridea Wealth Management (“Maridea”) today announced the acquisition of Ashford Investment Advisors, a Daytona Beach, Florida-based wealth management firm with approximately $180 million in assets under advisement and...

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