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MARIDEA WEALTH MANAGEMENT EXPANDS INTO OHIO WITH RIVER CITIES AND DFW INSURANCE

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Maridea Wealth Management has added River Cities Financial Services and Dietz, Futrell & Walters Insurance (DFW Insurance) to its national platform, establishing the company’s first presence in Ohio.

The affiliated firms are based in Marietta, Ohio, with additional offices in Beverly and Chillicothe. Together, they provide wealth management and insurance services to individuals, families and business owners.

DFW Insurance traces its history to 1948, when it was established as an independent insurance agency. River Cities Financial Services was formed in 1985 and provides wealth management, financial planning, retirement planning, investment planning and estate planning services. The firms also offer personal, commercial and employee benefits insurance.

Michael Anthony, president of River Cities Financial Services and a partner at DFW Insurance, will join Maridea as senior investment advisor and managing partner. Anthony has more than 20 years of wealth planning and investment advisory experience.

Dustin Becker, vice president of River Cities Financial Services and a partner at DFW Insurance, will become Maridea's director of insurance. Becker has more than 24 years of property and casualty insurance experience and has been a partner in both firms since 2018.

The firms' existing advisors, insurance agents and support employees will also join Maridea.

Mier Wang, founder and CEO of Maridea, said the firms' longstanding community relationships and combination of insurance and wealth management services complement Maridea's existing platform. She said the partnership also supports the company's expansion into new markets.

Clients will continue working with the same Ohio-based teams from their existing offices. Through Maridea, they will also gain access to additional investment research, planning resources and the company's tax services.

Anthony said maintaining the firms' local presence and existing client relationships was an important part of the partnership, while Maridea's resources will allow the team to provide additional services.

Becker said Maridea's expertise and resources will create new opportunities for employees, clients and the communities the firms serve.

Information for this article was provided by Maridea Wealth Management. Views and claims expressed in this article are those of the source company and do not necessarily reflect the views of AgencyEquity.com. This article may have been edited with the help of AI.

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