

**For Immediate Release**

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**Contact:**  
(O) 203.741.8514  
info@tidewaterwm.com  
www.tidewaterwealth.com

## **Tidewater Wealth Management Announces New Office in West Hartford, CT**

**NEW HAVEN, CONNECTICUT, October 18**—Tidewater Wealth Management, an independent wealth management firm, announced the grand opening of a new office in West Hartford today. The news of an additional office location coincides with the firm's one-year anniversary.

Last October, partners and long-time colleagues Bill McDonald, CFP®, Tim O'Shea, and David Wheatley, CLU®, ChFC®, founded Tidewater Wealth Management, a practice supported by NewEdge Advisors, a rapidly growing, New Orleans-based partnership RIA. The team provides holistic financial planning to individuals, small businesses, and foundations. They specialize in retirement and estate planning, portfolio management, and customized investments, including solutions for ESG and other social impact investing.

“We are excited to formalize our presence in Greater Hartford and solidify our commitment to this community,” said Partner and Senior Wealth Management Advisor Bill McDonald, CFP®. “Many of our clients are higher education and nonprofit professionals who live and work in the Greater Hartford area. It is important for us to have a local presence.”

The new West Hartford office is located at 10 N. Main Street, Suite 207. Hours of operation are 8:30a – 5:30p Monday through Friday. Meetings are by appointment only. The Tidewater team will also continue to operate from the original home office location at 157 Church Street, Suite 1940, in New Haven, CT.

For more information about Tidewater Wealth Management, visit <https://tidewaterwealth.com>.

### **About Tidewater Wealth Management**

Tidewater Wealth Management was founded in 2021 by financial industry veterans Bill McDonald, CFP®, Tim O'Shea, and David Wheatley, CLU®, ChFC® who combined have over 70 years of investment and financial planning experience. The practice, with locations in New Haven and West Hartford, Connecticut, is focused on collaborating with individuals and small businesses, helping them to achieve their financial goals.

