



**Fountainhead Asset Management Partners with Augulis Financial Firm**  
*CIO to provide expertise in the field of investing*

WARREN, NJ, February 18, 2022 – Fountainhead Asset Management (“FAM”) is proud to welcome Augulis Financial Firm, LLC (“Augulis”) to its platform. Augulis’ partnership with FAM will enhance and expand its investment offerings and expertise, while allowing Augulis to fully focus on its core specialization in estate, tax, and retirement planning.

By partnering with FAM, Augulis’ sophisticated planning solutions will be complimented by an institutional level investment process and trading approach, able to manage all the complexities that come with unique and customized solutions. In addition, Augulis’ clients will gain from the expertise of an entire team of investment specialists offering a full spectrum of services. These include customized client financial plans and advanced portfolio capabilities like tax optimization and private investment opportunities. The partnership will allow Augulis to further scale and grow its business, while providing materially more services and expertise to its client base.

“FAM will play a strategic role in Augulis’ future growth by allowing us to leverage our strong estate, tax and retirement planning client base and brand. We expect this partnership to be the key differentiator in exceeding our organizational growth plans.” Stated Alan L. Augulis, Managing member of Augulis Financial Firm, LLC.

The true winner of the FAM – Augulis partnership though is the Augulis client. By combining forces, Augulis and FAM will be providing end-to-end expertise across the entire financial spectrum in guiding the client to retirement and beyond. Augulis will lead in managing its client’s objectives and needs, while leveraging FAM for all investment-related services. Collectively, the firms will work in close coordination to ensure an optimal journey for each and every client.

“We are excited to partner with Augulis. By combining the core expertise in estate, tax, and retirement planning of Augulis with the institutional level investment services of FAM, we fully expect Augulis to triple its AUM within two years. Augulis’ clients will have a large team of experts providing end-to-end holistic financial advice for them and their families, while still maintaining strong, personal relationships with their advisor – what can be better!” remarked Joe Halpern, Managing Partner of FAM.

FAM has partnered with RIAs, individual advisors, insurance agents, accountants, lawyers, and others in providing a full-service, institutional level Chief Investment Office experience, allowing its partners to fully focus on what they are most passionate about – developing meaningful relationships with their clients while guiding them to financial success – and, at the same time, materially scaling and growing their financial practices.

### **About Fountainhead Asset Management**

Fountainhead Asset Management (FAM) is a Chief Investment Office (CIO) solution providing complete leadership in the field of investing. FAM provides its partners - advisors, agents, accountants, and others - with the experience, leadership, and capacity required to provide a sophisticated and differentiated investment management offering. By utilizing FAM's CIO services and capabilities, its partners are empowered to better serve advisor/client relationships while growing their businesses simultaneously.

For more information on how to partner with us, please visit [www.fountainheadam.com](http://www.fountainheadam.com).

### **About Augulis Financial Firm**

Augulis Financial Firm is a financial services firm committed to helping its clients make smart decisions about their wealth so that it can do as much good as possible. Augulis' approach is centered around building relationships of trust and believes its success as a financial services firm is dependent on the trust and confidence its clients place in the advice given.

Augulis uses a full, comprehensive wealth advisory approach to maximize the effectiveness of each of its clients' financial plans and its team of experts help to determine the best course of action to take. For more information, please visit [www.augulisfinancialfirm.com](http://www.augulisfinancialfirm.com).

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