



FOUNTAINHEAD

Fountainhead Announces Appointment of Chief Operating Officer

Keri Kutakoff to lead strategic initiatives to further scale and grow the firm's advisor offerings

WARREN, NJ, April 25, 2022 – Fountainhead is pleased to announce Keri Kutakoff has been appointed to fulfill the new role of Chief Operating Officer (COO) of the firm. A veteran financial executive and experienced business leader, Keri will oversee continued expansion at both Fountainhead Advisors (“FHA”) and Fountainhead Asset Management (“FAM”). Her responsibilities will include optimizing advisor practices inclusive of scaling client acquisition, increasing client engagement, navigating business succession and transition, and integrating the differentiated services offered through Fountainhead Asset Management. The result will be an enhanced and differentiated client and advisor offering that aligns with Fountainhead’s value proposition.

“Keri is a significant addition to our fast-growing team. We are excited to have her onboard,” said Joe Halpern, Chief Investment Officer of Fountainhead. “Keri will ensure that advisors are able to continuously differentiate and scale their practices through maximizing all that Fountainhead has to offer.”

Keri brings with her over 20 years of industry experience focused on developing platforms and solutions that have resulted in expanded revenue and growth for advisor practices. She began her career with Oppenheimer & Co. Inc., where she managed the firm’s Separate Account Investment Management Program. After the firm was acquired by CIBC Wood Gundy, she was a central leader of the design and execution of the separate account program throughout Canada’s Wood Gundy salesforce.

Following the acquisition of Oppenheimer by Fahnstock, Keri joined Bear Stearns as a Managing Director tasked with developing their sub-advisory and separate account programs. With a strategic vision of the platform, she served as a senior liaison across multiple business lines, including operations and marketing.

Since 2015, Keri has served as a Managing Director with Penn Mutual. In this most recent role she has specialized in practice management, providing coaching and development to help advisors optimize their practice across business operations and development, client acquisition and engagement and business succession and transition.

“We are very excited to welcome Keri to the Fountainhead Team and leverage her experience in developing solutions-based strategies for advisors and clients,” said Marc Rock, Managing Partner of Fountainhead. “We will look to Keri to bolster strategic relationships, streamline practice efficiency, and continue to strengthen the marketing platforms of both FHA and FAM.”

As part of Fountainhead's commitment to understanding the customized stories and backgrounds of both FHA clients and FAM advisors, Keri will ensure both sides of the business are run with maximum efficiency and expertise. Her long history in business operations and unique track record of successfully delivering innovative solutions for advisors will be leveraged.

Keri earned her undergraduate degree in Business Administration from the University of Delaware. In addition to Life and Health Licenses, she holds FINRA registrations 7, 63, 65 and 24. She earned her Chartered Institute of Management Accountants designation (CIMA) in 1998. She is currently a candidate to earn her Chartered Financial Consultant (ChFC) designation with the American College of Financial Services. In 2019, Keri was privileged to assume the role as President of the NY/NJ Women in Insurance and Financial Services (WIFS) Chapter.

Keri resides in Bernardsville, New Jersey with her three children, Samantha, Justin, and Josh. She is an active member of her local school community and enjoys spending her free time cycling and reading.

About Fountainhead Advisors

Fountainhead Advisors is an independent SEC Registered Investment Advisory (RIA) firm providing comprehensive, holistic financial planning to high-net-worth individuals and business owners worldwide. Fountainhead believes every client's financial life is as distinct as they are and deserves its own customized wealth management solutions. The depth and breadth of the Fountainhead team lends to their specialist approach and ability to connect to clients on a human level. The firm's collaborative style, combined with state-of-the-art technology, operations, and service teams, is designed to support the most sophisticated needs of both clients and advisors. For more information, please visit fountainhead-advisors.com.

About Fountainhead Asset Management

Fountainhead Asset Management (FAM) is an Outsourced Chief Investment Office (OCIO) firm serving financial advisors, RIAs, and accountants. As a thought leader in the field of investing, FAM provides customized beginning-to-end investment solutions that include comprehensive case design, rigorous due diligence and investment product selection and implementation. FAM's dedicated team of investment specialists stand ready to support advisors with a suite of research, commentaries, and time-sensitive market updates and content. By partnering with FAM, advisors are able to design an institutional quality practice aligned with outsourced C-suite services and capabilities, thus creating the freedom to grow and scale their own business. For more information, please visit www.fountainheadam.com.

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