



Thomas P. Morrone, CFP®, CPA

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I grew up in a family business and at an early age I learned the importance of hard work, providing an elevated level of service and the value of relationships. After college and about 15 years of working for big companies, I had the entrepreneurial desire to utilize my knowledge and experience in financial matters to help people figure out the story behind their numbers.

Today, I am a Partner of U. S. Wealth Management and the Principal of the firm's North Haven, CT office. My son, Paul Morrone, CPA, CFP®, leads the financial planning efforts in North Haven supported by my 40 years of business experience and further supported by the balance of the U.S. Wealth Management team. Clients appreciate the deep understanding that we develop regarding all facets of their financial lives. This enables us to coordinate all the professionals required to support their needs. Consolidating fractured advice that clients may receive from multiple sources minimizes the possibility of something significant falling through the cracks.

When not working with clients, I enjoy spending time with my best friend and wife Cathy enjoying a glass of fine wine. We love spending time with our son Paul and daughter Kelly along with their wonderful spouses Jill and David. Being the head landscaper at Villa Morrone brings me relaxation and I enjoy kayaking around the Branford shoreline. I can also be found around the grounds of New Haven Country Club, chasing around little white balls with my son Paul and hopefully someday my two grandsons.

#### Education and Designations

- CERTIFIED FINANCIAL PLANNER™ (CFP®)
- Certified Public Accountant (CPA)

Bachelor of Science in Accounting from University of New Haven '80

#### Affiliations

- Member of the Board of Directors of the Financial Planning Association, New Haven Chapter
- Member of the Financial Planning Association
- Member of the American Institute of Certified Public Accountants
- Member of the Connecticut Society of Certified Public Accountants