



# GENOVESE BURFORD & BROTHERS

BUILDING TRUST. BUILDING WEALTH.

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## GENOVESE BURFORD & BROTHERS EXPANDS WITH NEW OFFICE

### Placer Summit Financial Group merges into GBB, establishing GBB's presence in Placer Co.

Sacramento, Calif. — Genovese Burford & Brothers (GBB), an independent and locally-owned financial advisory firm, announced today that it has merged with Roseville-based Placer Summit Financial Group. As Sacramento has grown, GBB has been thoughtfully looking for opportunities to bring their services and culture to more clients across the region.

Placer Summit partners Scott Thomas and Rod Waterbury, along with Client Service Associate Tara Cavrikas, have joined GBB, adding to its talented bench of advisors. Thomas and Waterbury, both CFP® professionals with clean BrokerCheck® records, founded Placer Summit in Roseville in 2009 and built their firm around providing tailored service to their clients.

Founded in Sacramento in 1987, GBB is an independent financial planning and investment management firm built on the premise that a collaborative team could better serve clients' interests than any one individual. Today the firm features a complementary lineup of accredited advisors (holding designations such as CFP®, CFA, CPA, and CLU®) who work as a team to serve each client based on their needs.

"We are excited to welcome Rod, Scott, and Tara to the GBB family" said Mike Genovese, founding partner of GBB. "They take great care of their clients, and we know they will be an excellent fit at GBB."

Thomas and Waterbury, along with John Zezini, another CFP® professional, who joined GBB in 2015, will operate out of the current Placer Summit office at 1410 Rocky Ridge Dr. in Roseville through the end of the year. The location of GBB's new office in Roseville/Granite Bay will be announced later this fall and is scheduled to open shortly after the New Year.

"GBB's guiding principal is the same as ours: to act in the client's best interest, always," said Waterbury. "GBB has built a legacy of service and brings a disciplined approach to stewarding client savings, and we look forward to leveraging the team, network, and structure already in place at GBB to focus on serving our clients."

Genovese Burford & Brothers has offices in the Arden area, Downtown Sacramento, and Roseville/Granite Bay. The firm's vision is to be the clear choice for families of means in the Capital Region.

### About Genovese Burford & Brothers

Genovese Burford & Brothers was founded in 1987. The company manages \$2.5 billion in assets (includes all assets under management with GBB as well as brokerage and other securities business through Royal Alliance Associates, Inc.). GBB's clients include some of Sacramento's leading businesses, individuals, and families.

For more information, contact Genovese Burford & Brothers at (916) 924-7527 or visit [www.gbbwealth.com](http://www.gbbwealth.com).