

1 North Wealth Services Promotes Margo Cook to Partner

James Brennan, President and CEO of 1 North Wealth Services , is proud to announce the promotion of Margo Cook to Partner.



Maryland, Annapolis, May 24, 2021 (IssueWire.com) - James Brennan, President, and CEO of 1 North Wealth Services are proud to announce the promotion of Margo Cook to Partner. 1 North Wealth Services is an independent fee-only boutique firm of experts in managing active and customized investment portfolios. Its office is based in Annapolis and serves clients throughout the United States, with Margo focused primarily on clients who reside in the Chesapeake Region of Maryland/DC/Virginia and Florida. “Margo has proven to be an outstanding addition to our team, and I am delighted she has agreed to accept this Partnership role,” Brennan said. “She is a true community leader; she has been instrumental in advising our clients and delivering financial education and philanthropic advising, earning the respect and admiration of many philanthropic leaders in the region,” he went on to say.

Margo Cook’s expertise is a true asset to 1 North Wealth Services. 1 North is committed to philanthropic investing, proven by the fact that they sought Margo for her extensive philanthropic expertise highlighted by the Chartered Advisor in Philanthropy (CAP) and Certified Fund Raising Executive (CFRE) credentials that she holds that compliment her Certified Financial Planning (CFP) certification. This makes her uniquely positioned to serve the region’s philanthropic leaders, as well as clients in all stages of their lives – whether they are new to saving, experiencing a life change with loved ones or at work, or ready to enter their work-optional stage.

One of Margo’s greatest assets is her passion for 1 North’s “Doing Well While Doing Good.” She helps guide investors in both their investment portfolios and philanthropic giving to maximize assets in support of their personal missions. This approach allows individuals to prioritize profit and align investments with their moral compass without sacrificing returns.

Margo joined 1 North because their team of fee-only experts provides advice untainted by sales incentives and/or commissions. Genuine care for clients is 1 North’s core holding, and trust is the core result. 1 North is committed to empowering women and minorities in the workforce. Promoting Margo to Partner is just one example of this commitment.

1 North also invests philanthropically in local communities by providing both meaningful financial support and time and expertise to deserving local organizations. Some of these organizations include Anne Arundel Women Giving Together (AAWGT), Start the Adventure in Reading (STAIR) Annapolis, Baltimore Washington Medical Center, Medicine with a Mission, Annapolis YWCA, Blue Water Baltimore, St. Mary’s Catholic School, and many others. Margo is also appointed by the Governor to serve on Queen Anne’s County Property Tax Appeals Board. Margo is a volunteer educator at Pathways Drug and Alcohol Treatment Center on the topic of financial recovery from the disease of addiction. She also provides pro-bono services to victims of domestic violence, vital to ensuring their financial recovery. She is a YWCA TWIN (Tribute to Women in Industry) awardee and dedicates much of her free time to the community.

Margo lives with her husband, Lee, and their two children on Maryland’s Eastern Shore. They are active members of the community and enjoy boating and spending time with loved ones; both in Maryland and Florida. She and her husband were born and raised in Maryland, having attended St. Mary’s Catholic School in Annapolis together. Margo then graduated with a degree in Business Administration from the University of Miami, FL.

Margo is known for her determination, dedication, and diligence on behalf of her clients. She always strives to serve them with the highest level of integrity doing everything she can to help them realize their

goals. “I find great joy in my work at 1 North Wealth Services, and I am happy to work tirelessly on behalf of my clients. I genuinely care deeply for each and every one of them,” Cook said.

For more information about 1 North Wealth Services, visit <http://1northwealthservices.com>. To reach Margo directly, email margo@1nwealth.com or call 410-975-0099. To find Margo on Linked In, please go to <https://www.linkedin.com/in/margo-cook/>.

1 North Wealth Services is an independent fee-only boutique firm of experts in managing active and customized investment portfolios, specializing in financial planning and investment management advice to individuals, families, philanthropists, and business owners seeking to achieve their financial goals. Based in Annapolis, Maryland, 1 North Wealth Services serves clients throughout the United States. To learn more about 1 North Wealth Services, please go to <https://1northwealthservices.com/>.

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