

**FOR IMMEDIATE RELEASE:**

## **Impact Capital Partners Launches as an Independent Registered Investment Advisor**

**Dedicated to making an impact in clients' lives through comprehensive, customized financial planning and strategic investment solutions.**

Denver, CO (February 8, 2024) — Stone-Segal Wealth Management has transitioned its wealth management and financial planning services to Impact Capital Partners LLC (“Impact Capital”), an independent Registered Investment Advisory (RIA) firm. Based in Greenwood Village, outside of Denver, the newly formed firm was co-founded by Brett Stone, CFP,<sup>®</sup> and Greg Segal, both of whom are highly respected and well-established wealth management and investment professionals in Colorado, California, and several states in the Midwest. Stone-Segal Wealth Management was formerly affiliated with UBS.

Over the past few decades, the Impact Capital team has developed a specialty in guiding families, entrepreneurs, business owners, and corporate executives through the unique financial planning and transition issues that arise throughout their careers.

“Now that we have made our own transition to independence, our newly expanded capabilities and extended resources enable us to deliver an unprecedented level of service, and unparalleled involvement and dedication,” says co-founder and partner, Brett Stone. “As an RIA, we now have greater control over the services we offer and we can provide a broad range of research, products, and solutions to our clients, thoroughly supporting the achievement of their goals and aspirations.”

Partner Greg Segal, concurs. “It is our strong belief that this essential process works only through the effective integration of wealth, tax, estate, risk, liability, and distribution management. With a knack for discovering out-of-the-box solutions, our team is dedicated to serving our clients in a holistic way.”

The Impact Capital team consists of five professionals, two of whom are CERTIFIED FINANCIAL PLANNERS.<sup>™</sup> Each team member is a partner and brings a depth of experience and acumen to interactions with clients. Impact Capital team members include:

- Brett Stone, Partner, CFP,<sup>®</sup> CEPA
- Greg Segal, Partner
- Anna Healy, Partner, CFP,<sup>®</sup> CDFA,<sup>®</sup> Planning Specialist
- Shannon Graham, Partner, CPWA,<sup>®</sup> Relationship Manager
- Jonathan Ameen, Partner, CIMA,<sup>®</sup> Analyst

Impact Capital Partners LLC  
8101 East Prentice Avenue, Suite 1080  
Greenwood Village, CO 80111

Impact Capital Partners LLC is a registered investment advisor. More information about the range of services offered by Impact Capital can be found at [ImpactCapitalPartners.com](https://www.impactcapitalpartners.com) or by calling 1.888.30-IMPACT (888.304.6722).

**Media Contact:**

Shannon Graham  
Impact Capital Partners, LLC  
8108 East Prentice Ave. Suite 1080  
Greenwood Village, Co 80111  
888-304-6722  
[info@impact-cp.com](mailto:info@impact-cp.com)

Impact Capital Partners LLC is a registered investment advisor. Please visit our website at [ImpactCapitalPartners.com](https://www.impactcapitalpartners.com) for important disclosures.