



David J. Boczar, CFP®, CFA

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David J. Boczar, CFP®, CFA Forms Emerald Wealth Advisors and Partners with Westport Resources



David J. Boczar, CFP, CFA is pleased to announce that he has formed **Emerald Wealth Advisors** to provide financial guidance and counsel to individuals, families and small businesses. He has also become affiliated with Westport Resources, a Westport, Connecticut-based private wealth management firm. David has a long and distinguished career in the financial services industry in investment research, money management, advisory, compliance and banking, encompassing over 20 years of experience.

“I am delighted to align my practice with Westport Resources. The firm’s philosophy of serving its clients in a uniquely personalized manner by addressing goals and developing comprehensive solutions to achieve these goals is completely consistent with the method I employ with my clients,” exclaimed Boczar.

“Moreover, the firm’s structure of working with independent Professional Affiliates represents a natural compliment to a client-driven and entrepreneurial focus.” Boczar also noted out the company’s solid back office and clearing capabilities through National Financial Services LLC, a unit of Fidelity Investments, one of the world’s most respected financial institutions. John Adams Vaccaro, CEO and founder of Westport Resources, commented, “We are very pleased to align with David. His focus on client relationships and comprehensive service is a solid fit with our business philosophy. “

David was most recently affiliated with the Connecticut Agency, an office of MetLife Financial Services, where he began developing his client-focused wealth management/financial planning practice. Prior to working with individuals and families, David was extensively involved in the global institutional financial services business. He held a progression of increasingly responsible positions in securities analysis, asset management and financial services with firms including Mutual Benefit Life in the portfolio department, MCM, an independent bond-rating agency, New Japan Securities Int’l, a leading Japanese financial services firm, and Value Investment Partners, a research boutique/investment bank where he developed a mid- to large-cap value research capability for U.S. and European institutional investors.

A Chartered Financial Analyst (CFA) and a CERTIFIED FINANCIAL PLANNER™ professional, David is active in a number of professional organizations including the Financial Planners Association (FPA), the New York Society of Security Analysts (NYSSA), and the Stamford CFA Society. David earned an MBA from Seton Hall University, and BA degrees in Business Administration and English from Rutgers University.

David serves as Treasurer of the Easton Exchange Club (focused on the prevention of child abuse), is a Custodian of the Trust Funds for the First Presbyterian Church of Fairfield, CT, is a member of the Fairfield Chamber of Commerce, a member of the advisory board for the American Heart Association, is an activity leader of the Welcome Club of Fairfield/Easton, and former President and VP of the Theta Chi Alumni Corp. of Rutgers University. David is married and has two children. He and his family live in Easton, CT.

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David J. Boczar is a Professional Affiliate of Westport Resources. Westport Resources Management, Inc. (WRM) is an Investment Advisor registered with the SEC and the State of Connecticut. Westport Resources Investment Services, Inc. (WRIS) is a Broker/Dealer registered with the SEC and is a member of the NASD and SIPC. WRM and WRIS are not affiliated with Emerald Wealth Advisors. For more information about Westport Resources, please visit the company’s web site at www.westportresources.com