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### **Clearbrook Financial Announces New Chief Executive Officer**

Princeton, NJ, June 3, 2009 – Clearbrook Financial, LLC, (Clearbrook) an independent financial services firm that provides tailored solutions to high-end investment advisors, institutions, multi-family offices and investment managers, announced today that Robert J. Mooney has joined the firm as its Chief Executive Officer, effective immediately. John Morris remains as Chairman and will focus on Clearbrook’s strategic direction and new initiatives.

Mr. Mooney is a 22-year veteran of Merrill Lynch where he held senior executive positions within the firm, including General Counsel of Merrill’s Global Wealth Management (GWM) business; General Counsel, Chief Administrative Officer and Head of Human Resources for the firm’s International Private Client Group; and most recently Chief Business Risk Officer for GWM. Prior to Merrill Lynch, Mr. Mooney was an attorney for the U.S. Securities and Exchange Commission’s Division of Market Regulation.

“I believe that Clearbrook is strategically positioned to take advantage of the changing advisory landscape,” says Mr. Mooney. “Clearbrook has developed a truly independent and transparent offering for both institutions and private clients. I’m excited about the opportunity to partner with the Clearbrook team to further build a trusted brand and meet client needs in this changing and challenging environment.”

“We are thrilled to have Rob join our firm,” states John Morris, Chairman and co-founder of Clearbrook. “His experience and reputation in the industry, coupled with his strengths in risk management, and his background with the SEC make him an ideal candidate to lead this firm. In today’s rapidly changing regulatory environment, Rob’s capabilities provide our firm with significant advantages as we look to expand our business.”

“Based on what we have achieved to date, we have a great story to tell,” adds Elliott Wislar, co-founder and President of Clearbrook Financial. “Rob strengthens our team and enables John and I to actively develop key strategic relationships. When John and I started this firm four years ago, we believed that the traditional financial services industry was broken and that there was a better way to do business. We have stayed true to our beliefs and I am excited about the opportunity that lies ahead of us.”

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“John and Elliott have built a terrific foundation for the future,” says Mr. Mooney. “Four years ago, John and Elliott correctly anticipated industry changes and they have charted a course toward a new model financial services organization.”

**About Clearbrook Financial**

Clearbrook Financial is an independent financial services firm, providing customized advisory solutions, including its SMA Exchange<sup>®</sup>, to investment professionals who serve institutions and affluent individuals. The firm, through its subsidiaries, advises to over \$30 billion in assets. For more information, visit [www.clearbrookfinancial.com](http://www.clearbrookfinancial.com).

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