



Contact: Elliott Wislar  
Clearbrook Financial  
609.921.8916  
[elliott@cbfllc.com](mailto:elliott@cbfllc.com)

## **Clearbrook Financial Announces Engagement of Windward Advisory Group**

Princeton, New Jersey, April 13, 2010 — Clearbrook Financial, LLC, (Clearbrook) an independent financial services firm providing investment and strategic advice, investment solutions, and related wealth advisory services to institutions, individuals and financial advisors, announced today that they have engaged Windward Advisory Group (“Windward”), a firm specializing in the optimization of technology, operations and strategic initiatives for family offices and financial services organizations.

Windward specializes in working with financial firms to bring a common sense approach to best practices, operational solutions and right-scale technology. For Clearbrook, Windward will be providing support and counsel in the development of operational, custodial and technological infrastructures for Clearbrook’s current businesses and their new wealth advisory platform. Windward will specifically focus on technology and operational assessments, implementation of best practices, solution provider searches, system integration and strategic reviews and guidance.

Clearbrook’s Chief Executive Officer, Rob Mooney said, “We are very excited about partnering with Windward and believe that Jim Campbell and the Windward team will help us devise a technology and operations plan that will not only benefit us today, but will be instrumental as we expand our business.”

Windward executive and partner Jim Campbell added that, “Clearbrook is at a point in its evolution where I believe Windward can truly add value and help set technology and operational direction for this growing organization. We feel very good about the synergies between our two firms and look forward to a long and prosperous relationship.”

### **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).