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Cassata joins Rockland Trust as business owner advisory strategist

March 08, 2024 - Financial Digest



Michael Cassata

Hanover, MA Rockland Trust's Investment Management Group (IMG) is expanding its services with the appointment of Michael Cassata as the business owner advisory strategist. In this newly developed role, Cassata provides business owners with the strategic support and guidance to explore succession planning and organization valuations while implementing strategies to minimize overall company transition risks.

"As a relationship-oriented bank, we are continuously looking for opportunities to support our clients through important transitions and milestones," said David Smith, managing director and EVP, chief investment officer at Rockland Trust. "Bringing Michael on board allows us to provide the intricate guidance business owners need during the complex and delicate decision-making process of transitioning the ownership of their business. Michael's expertise broadens our comprehensive wealth management services and enables us to further serve local business owners."

Cassata joins Rockland Trust with over 23 years of experience assisting businesses with merger and acquisition (M&A) transactions. Prior to joining Rockland Trust, he was a managing director at Consilium Partners.

and then GT Securities, focusing on M&A transaction advisory services. Cassata has advised over 100 businesses on growth strategies and business models in verticals from software to business services. Early in his career, he founded a healthcare software company that successfully merged with a NASDAQ-listed firm that operates as a business unit of Veradigm Inc. (formally Allscripts) today.

Cassata is a Certified Exit Planning Advisor, a FINRA-registered securities professional holding a Series 63, 79, and 24 regulatory designation, and received his BS in Electrical Engineering from the University of Connecticut.

New England Real Estate Journal - 17 Accord Park Drive #207, Norwell MA 02061 - (781) 878-4540