

FOR IMMEDIATE RELEASE

**Charter Oak Capital Management Names
Sarah Serling as Chief Executive Officer**

PORTSMOUTH, NH & KENNEBUNK, ME, September 12, 2025—Charter Oak Capital Management, a leading fiduciary wealth management firm serving New England's top earners, proudly announces the appointment of Sarah Serling, JD, CFP®, as Chief Executive Officer.

Sarah has served as acting CEO since January 2024, guiding the firm through a period of growth and transformation. Her appointment reflects the Board's confidence in her leadership and vision, and her ability to build on the foundation established by Charter Oak's Founder and Managing Partner, Jeff Troiano, who will maintain a role as Board Chair and Financial Advisor at the firm.

"We are confident Sarah will lead Charter Oak with great pride, compassion, and integrity," said Troiano. "An effective communicator and leader, Sarah is well-suited to take the company forward, remain client-focused, and bring innovation and growth to the firm."

As CEO, Sarah will continue to uphold Charter Oak's core values and passion for helping clients and colleagues live their best lives through comprehensive financial planning, behavioral coaching, and investment management. She will focus on the firm's operational growth, mentor new financial advisors and staff, and accelerate technology platforms while building capabilities for the next generation.

"I'm honored to officially step into the CEO role and build on the strong foundation Jeff and our team have created," said Sarah. "My passion lies in cultivating a thriving culture, delivering exceptional client experiences, and positioning Charter Oak for long-term success. I'm excited for what's ahead."

A former competitive mountain bike racer, Sarah embraces outdoor activities, including skiing and hiking with her family—often in Rangeley, Maine. Originally from upstate New York, Sarah lives in Madbury, New Hampshire, with her husband Dan Clapp and their three daughters.

About Charter Oak Capital Management

For more than 30 years, Charter Oak has supported the wealth management needs of New England's top earners and their families from its offices in Portsmouth, New Hampshire, and Kennebunk, Maine.

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