



Maridea Wealth Management Expands into Arizona Through Partnership with Heritage Financial Strategies

Brooklyn, NY – September 3, 2025 – **Maridea Wealth Management** today announced its partnership with **Heritage Financial Strategies**, a women-owned practice based in Gilbert, Arizona. The transaction establishes Maridea’s first office in the greater Phoenix area, further expanding the firm’s national footprint into the Southwest.

Founded in 2015 by **Shanna Reed**, the Arizona practice serves approximately 200 households with a focus on financial planning, investment management, and insurance services. For the past decade, Shanna has been affiliated with Cambridge Investment Research and will now transition to Maridea, bringing her clients and her team with her. She will be joined by **Alden Rowe**, who will also become part of Maridea through this transaction.

“Our team has always been about providing thoughtful, personalized advice and building lasting relationships with our clients,” said Shanna Reed. “By joining Maridea, we gain access to a national platform, deeper resources, and a team that shares our values of excellence and hospitality. The deep bench of talent and entrepreneurs at Maridea will help us grow, and I’m excited for what this partnership means for our clients and for Alden and me personally.”

Maridea Wealth Management has grown by combining organic expansion with selective transactions, supported by its operational infrastructure, centralized investment resources, and commitment to creating a permanent home for advisors and their clients. With offices across key U.S. markets, the addition of the Phoenix location marks a strategic step in serving one of the fastest-growing wealth regions in the country.

“Upon first meeting Shanna, we knew immediately she was a cultural fit for Maridea,” said Mier Wang, Founder and CEO of Maridea Wealth Management. “We’re thrilled to welcome Shanna, Alden, and the entire team to Maridea. Their dedication to client service and entrepreneurial spirit align perfectly with our culture, and we look forward to building our presence in Arizona together.”

“As a resident of the greater Phoenix area, I’m especially proud to see Maridea establish a presence here,” said **Daniel Lidawer, Board Member of Maridea, former Co-Founder of Hightower Advisors and Co-Founder of Cresset Wealth Advisors**. “Arizona is one of the country’s fastest-growing markets for wealth creation, and Shanna and Alden are exactly the kind of client-centric advisors who can make an impact. This is an exciting milestone for Maridea and for the community.”

To Learn More, please visit www.marideawealth.com