COASTAL Wealth Management | Ameriprise Financial

A private wealth advisory practice of Ameriprise Financial Services, Inc.

Our goal is to provide successful individuals with personalized, objective financial advice. We strive to provide the extra confidence that comes from a relationship with someone who understands your complex financial and estate planning needs.

Areas of focus include:

Retirement Income Planning

Portfolio Management

Estate/Legacy Planning Strategies

Tax Management Strategies

Tax Savings through Charitable Giving

Healthcare and Long-Term Care Planning

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Jason Cerniglia, CFP®, CRPC®, CMFC®

Certified Financial Planner | CEO
Coastal Wealth Management
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Jason Cerniglia is in his 19th year working as a Financial Advisor. After graduating from the University of Connecticut with degrees in Finance and Public Relations, he started out as a Financial Advisor at Smith Barney in Boston, MA. In 2004, Jason and his team began to sense that the "brokerage" only model was not the best way to serve our clients. On January 5th, 2005, Jason and his team transitioned to Ameriprise Financial and he became a franchise owner in September of 2007. Over the course of the last 19 years, Jason has earned numerous professional designations and awards. Currently, as a "Private Wealth Advisor" Jason and his team are considered one of the top 30 advisory teams (nationally) at Ameriprise. Coastal Wealth Management has also been recognized by Barron's, Forbes, and the Financial Times as one of the top financial planning and asset teams in the nation.

As a Certified Financial Planner and CEO of Coastal Wealth Management, Jason focuses on financial planning, retirement distribution planning, and investment management for his clients. Jason's clients include (but are not limited to) executives at many of our local fortune 500 companies, business owners, and family trusts. Jason also oversees Coastal Wealth Management's Investment Policy Board. The board works directly with Ameriprise's investment research group to shape investment portfolio and allocation decisions for our clients' investment portfolios.

Coastal Wealth Management has offices in Mystic, CT and Glastonbury, CT. Jason and anyone on his team can be reached at 860-430-1780 or 860-245-0251.

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Bryan J. Lauriat, APMA®
Financial Advisor | Managing Director
Coastal Wealth Management
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Bryan Lauriat is currently in his 15th year in the financial services industry. He has extensive experience across several areas of the business including financial planning, investment advice services, investment research, trading, client service and operations. He largely credits this background for making him the advisor he is today. One who, in addition to financial planning and investment management, also understands the operational complexities of the financial services industry. This unique skill set has enabled Bryan to deliver not only well-communicated financial advice and effective, cost-efficient investment guidance but, more importantly, an exceptional service experience for each and every client he works with.

As a Financial Advisor at Coastal Wealth Management, Bryan focuses primarily on comprehensive financial planning, retirement income strategies, investment management and insurance solutions. Whether he is educating the young investor just getting started, helping a busy small business owner navigate the complexities of implementing a retirement savings plan for their employees, or working with folks in retirement to help "recreate" their paychecks, Bryan's passion for financial planning is quickly evident.

Bryan is head of trading at Costal Wealth Management and a member of the team's Investment Policy Board. He holds a bachelor's degree in Economics from the University of Connecticut and the Accredited Portfolio Management Advisor (APMA®) designation from the College for Financial Planning.

Bryan is an avid sports fan and athlete. He plays ice hockey and softball competitively and also enjoys golf and skiing with his family. He, his wife Lisa, and their son Kaden live in North Haven, Connecticut with their rescue dog Jack.