



Dynasty Investment Bank Served as Exclusive Financial Advisor to Procyon on Its Acquisition of Wooster Corthell Wealth Management

July 2025



Dynasty Financial Partners Acted as Financial Advisor to Procyon



On its acquisition of



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Transaction Details

- On July 8, 2025, Procyon announced its acquisition of Wooster Corthell Wealth Management, ("Wooster Corthell") a Connecticut-based boutique advisory managing approximately \$600 million in client assets
- Wooster Corthell's Glastonbury, CT, office will continue full operations, with three advisors and five staff members joining Procyon's growing team
- The strategic acquisition brings total assets under management for Procyon to over \$8 billion

Overview of Procyon

- Since inception in 2017, Procyon has grown to 50+ employees with offices in Connecticut, New York City, Long Island, Tennessee, and Maryland
- Procyon supports affluent individuals, families, and business owners in identifying and implementing effective financial strategies to manage their investments and achieve their lifelong financial goals
- Procyon also provides institutional services, partnering with companies and organizations to design, manage, and enhance their retirement and health plan offerings while delivering superior retirement guidance to plan participants

Overview of Wooster Corthell

- In 1992, Al Wooster founded what later became Wooster Corthell, now consisting of eight total experienced professionals, including three financial advisors
- With ~\$600 million in AUM, Wooster Corthell advises professionals and executives specializing in the aerospace, insurance, and defense sectors as well as high-net-worth families, by providing holistic wealth management and financial planning services
- The firm is based out of Glastonbury, CT, providing easy access for all central Connecticut residents

Strategic Rationale

Strengthens Service Capabilities

Builds upon Procyon's expertise in retirement planning, customized wealth strategies, and multi-generational advisory services

Deepens National Independent Platform

Expanded northeastern presence to deliver high touch solutions to towns outside of major metro areas

Aligned Management Philosophy

Both firms share a client first focus, comprehensive view of family wealth planning, fiduciary integrity, and dedication to long-term relationship building



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