The Massimo-Anastasian Team

A brief introduction to the team.

Our dedicated financial advisor team specializes in comprehensive services including:

- Retirement Income Planning
- Investment Management
- Financial Planning
- Tax Strategies
- Estate Planning
- Risk Management + Insurance

We place a strong emphasis on empowering women through personalized financial strategies tailored to their unique needs and goals. Our mission is to provide experienced guidance and support for all our clients.



Check Out Our Podcast! Your Pathways to Wealth

Listen anywhere that hosts podcasts or at *yourpathwaystowealth.com*

Firm Overview

A brief introduction to Wealth Enhancement.

In 1997, four advisors founded a firm to provide comprehensive financial guidance under one roof, aiming to relieve clients' financial stress. This evolved into the Roundtable™, a team of specialists in six core areas of wealth management, ensuring organized and straightforward financial lives. Our advisors adhere to a fiduciary standard, offering personalized advice always in your best interests.

Key figures

Client assets ..... $98.31B[1]
Client retention ..... 97.07%[2]
Households ..... 96k+
Office locations 154

1 Wealth Enhancement and its Registered Investment Advisor, Wealth Enhancement Advisory Services, have $98.31 billion in client assets as of 04/01/25.

2 Average annual retention rate – January 1, 2010, through December 31, 2024 – based on client households with assets greater than $100K in our existing offices.

Recent awards & accolades

Barron's Top 100 RIA Firms

2024: Ranked #5 (awarded 9/16/2024)
2023: Ranked #5 (awarded 9/15/2023)
2022: Ranked #6 (awarded 9/19/2022)

Awarded on 9/16/2024 (Mega RIA), 9/15/2023, and 9/19/2022. Ranked on assets, revenue, and quality of practice as of June 30th of the ranking year.

Forbes America's Top RIA Firms

2024: awarded 10/8/2024
2023: awarded 10/10/2023
2022: awarded 10/25/2022

Awarded in October of the ranking year for the one-year period ending March 31st of the same year.

631-777-1030
www.yourpathwaystowealth.com
724 Long Island Avenue
Deer Park, New York 11729

Wealth Enhancement®

Advisory services offered through Wealth Enhancement Advisory Services, LLC, a registered investment advisor.

Meet the team



Charlie Massimo | Senior Vice President, Financial Advisor

Charles Massimo is a dedicated financial advisor passionate about empowering women in transition, affluent individuals nearing retirement, and families impacted by autism. With years of experience, he takes a personal approach to wealth management, simplifying complex financial situations into understandable pieces. Charles provides tailored strategies, builds lasting relationships founded on trust, and aims to simplify financial planning, offering clients confidence and a clear path to a prosperous future.



Peter Anastasian | Senior Vice President, Financial Advisor

With nearly 30 years of experience, Peter Anastasian partners with individuals, families, and women to create financial plans through intention — making financial decisions that honor values and stable futures. His comprehensive approach integrates investments, tax strategies, and estate planning to preserve and grow wealth across generations. Dedicated to building lasting relationships, Peter treats every client's financial wellbeing as if it were his own family's.



Scott Brown | Financial Advisor, CFP®

Scott is a Certified Financial Planner® professional and has worked in the financial services industry since 2002. Prior to joining Wealth Enhancement, Scott was a Regional Vice President for some of the largest insurance companies in the world. He has worked with hundreds of financial professionals to develop retirement income plans for their clients. He graduated from Vanderbilt University with a bachelor's degree and later earned his MBA in Finance from The Ohio State University. Scott and his wife Marcella live in Rockville Centre, New York and in their spare time enjoy listening to live music, visiting the North Fork wineries, and attending New York Rangers hockey games.



Alex Benezowitz
Client Service Manager



Stephanie DeCarlo
Senior Client Service Associate



Donna Herrera
Senior Client Service Associate



Cooper Czajka
Client Service Associate



Diane Peters
Senior Client Service Associate



Kaitlyn Doukas
Client Service Associate

631-777-1030
www.yourpathwaystowealth.com
724 Long Island Avenue
Deer Park, New York 11729

Wealth Enhancement®

Advisory services offered through Wealth Enhancement Advisory Services, LLC, a registered investment advisor.