

Long Island  
**BusinessNEWS**  
**Executive**  
**Circle Awards**

## Jonathan Blau

*President and Chief Executive Officer, Fusion Family Wealth*



Jonathan Blau is the Founder and CEO of Fusion Family Wealth, a Long Island-based fee-only Registered Investment Advisory firm whose investment philosophy is centered on helping shape positive investor behavior.

As a summer intern at Lehman Brothers, he realized the void that existed in the industry as far as the availability of objective, planning-based, client centric advisory services for wealthy investors. Preparing for this perceived opportunity, he pursued Masters degrees in taxation and accounting and spent five years in the family wealth planning group of a "big six" accounting firm, where he honed his technical knowledge and planning skills. In 1996, he joined Sanford C. Bernstein & Co. The opportunity to work directly for a top money management firm and to learn every aspect of the money management process, provided invaluable perspective which helped to shape his future career path. From 2000-2013, recognizing the need to offer broader diversification than what was available from a single money manager, Blau and his team moved to Morgan Stanley and adopted an open architecture platform to benefit his clients.

After spending 15 years with large investment houses he was introduced to Dynasty Financial

Partners, a provider of wealth management and technology platforms for independent advisory firms. With the help of Dynasty, he founded Fusion Family Wealth to fuse his team's knowledge of traditional investing with their expertise in investor psychology to seek more consistent, less stressful and highly achievable wealth preservation and enhancement outcomes.

Partly owed to his deep accounting background, Blau works closely with many of the top professional service firm's on LI. Proud to be able to be called upon as a trusted advisor to 5 of the current/former managing partner's among LI's largest account firms, he is often referred to as the advisor's advisor. He has lectured for the Foundation for Accounting Education (FAE) on the topic of Taxation of Financial Services.

Blau has enjoyed helping to advance the Long Island business and personal community. He volunteered his time and resources as a major fund raiser for the Cohen's Children Hospital, a former board member of the Gurwin Family of Healthcare services, a current board member of the Middle Market Alliance of Long Island and a frequent supporter of the American Heart Association and Sunrise Day Camps.

**What professional accomplishment are you most proud of?**

Becoming a thought leader in the area of investor behavior. This approach allows our clients to experience a less stressful and more successful path to realizing the objectives they value most in their financial lives, while creating a client / advisor relationship based on mutual trust and respect.

**What attracted you to your industry?**

I spent two summers as an intern at Lehman Brothers,

witnessing a culture that encouraged selling "hot" stocks with attractive stories or narratives (without regard to client suitability or the investments' merits). This allowed me to appreciate, early on, the need for objective, planning-based, client centric advisory services for wealthy investors.

**What do you do to give back to your community?**

I volunteer to advance the Long Island business and personal communities. I raised \$75,000 enabling technology

advancements at Cohen's Children's Hospital. I also sit on the board of the Middle Market Alliance of Long Island helping to promote a thriving ecosystem of leading companies and professionals on LI. I was on the board of the Gurwin Family of Healthcare services, a LI-based leader in the nursing, rehab and assisted living space.

**Name another c-suite executive you admire.**

John Shalam, the founder and Chairman of Voxx, International, formerly Audiovox