



Lorenzo P. Gaudio, CFP®, C(k)P®, CRPS®
Retirement Plan Advisor & Wealth Advisor
Carson Wealth

Lorenzo has been advising clients in the financial service and retirement industry for over two decades. A graduate of Fairfield University and a Certified Financial Planner™ professional, he concentrates on building comprehensive wealth management strategies and corporate retirement solutions for busy business owners and families.

Working together with his clients, Lorenzo uses a defined and disciplined process that begins with the client's goals and what is most important to them. Through this process, he helps to design retirement plans which are designed to strengthen clients' financial health by protecting, growing, and transitioning wealth in a tax-efficient manner.

Lorenzo lives in Roxbury, CT, with his wife and son and is an active member of the community. He participates on regional boards, focusing on local tourism, conservation, and planning. He also sits on the Alumni Board for the PA Omicron Chapter of Sigma Phi Epsilon and is an active member of King Solomon Lodge No. 7 in Woodbury, CT; St. Elmo Commandery No. 9 in Meriden, CT; and the Lafayette Consistory in Stratford, CT.

Outside of work, Lorenzo enjoys cooking, gardening, wine tasting, public speaking, and traveling.

Jonathon Dues, Vice President of U.S. Defined Contribution – Bio

Jonathon serves as Vice President of U.S. Defined Contribution within the Fisher Investments Institutional Group. In this role, he leads the business development efforts of the Personalized Retirement Outcomes (PRO) solution with top retirement plan advisors and recordkeepers across the country. Prior to joining Fisher Investments, Jonathon was National Director, DCIO with RS Investments (now, Victory Capital) from February 2014–May 2017 and prior to that was Senior Vice President with Mesirow Investment Strategies from 2006–2014. Jonathon began his financial services career at Ibbotson Associates in 2005.

Jonathon attended Hillsdale College in Michigan where he graduated with a B.S. in Speech Communication. He has been married for 15 years to his wife, Lindsey, and is a father of two to Jonny (11) and Mara (8). Jonathon is also Co-Founder of Swish House, a basketball fitness company with operations in Chicago, New York and Raleigh-Durham.