

SWM Advisors was founded on the belief that people's lives will be better if they receive advice that is truly in their best interests. We embrace our responsibility to positively impact our client's lives and hope, that when all is said and done, they feel their life's journey is more enriched because our paths have crossed.

Private Clients »
(/private-clients)

401(k) Plans » (/401k-plans)

Our Team

Our professionals have well-developed expertise and extensive global experience having worked with high net-worth individuals plus some of the world's largest and most sophisticated corporations, pension plans, sovereign wealth funds and foreign central banks. Our team brings a global, insightful, and disciplined perspective to each of our client relationships.

Experience *Counts*.



(/our-team/#matt-digennaro)

Matt DiGennaro (/our-team/#matt-digennaro)



(/our-team/#valerie-digennaro)

Valerie DiGennaro (/our-team/#valerie-digennaro)

Managing Partner

Founder & CEO



(/our-team/#doug-case)

Doug Case, CFA, CAIA (/our-team/#doug-case)
Chief Investment Officer



(/our-team/#vikram-kuriyan)

Vikram Kuriyan, PhD, CFA (/our-team/#vikram-kuriyan)
Company Advisor



(/our-team/#andi-mullins)

Andi Mullins, CPA (/our-team/#andi-mullins)
Chief Compliance Officer



(/our-team/#seth-carpintero)

Set Carpintero, CFP® (/our-team/#seth-carpintero)
Wealth Advisor

“A very low-cost index fund is going to beat a majority of professionally-managed money. The gross performance [of actively managed money] may be reasonably decent, but fees will eat up a significant percentage of the returns.”

Warren Buffet, Berkshire Hathaway

ABOUT US

[Our Firm \(/about-us/\)](#)

[Our Team \(/our-team/\)](#)

LEGAL

[Legal Notice \(/legal-notice/\)](#)

[Privacy Policy \(/privacy-policy/\)](#)

Form ADV 2A (http://www.adviserinfo.sec.gov/iapd/content/viewform/adv/sections/iapd_AdvIdentifyingInfoSection.aspx?ORG_PK=158398&RGLTR_PK=50018&STATE_CD=FL&FLNG_PK=00C664AC0008017C0586F290056C9915056C8CC0)

ADDRESS

One Beach Drive SE
Suite 301
St. Petersburg, FL 33701

PHONE

727.456.0011 office

E-MAIL

info@swm3.com ([mailto:info@swm3.com?subject=SWM Advisors web inquiry](mailto:info@swm3.com?subject=SWM%20Advisors%20web%20inquiry))