

Hearts & Wallets Hires Grace Patel as Client Success Relationship Manager

New Position Supports Growing Client Base for Firm's Financial Market Research, Interactive Software and Advice Benchmarking

(August 23, 2022, Rye, NY) – Research and benchmarking firm [Hearts & Wallets](#) announces the hire of Grace Patel as client success relationship manager to support the firm's growing client base and demand for financial market research, interactive software and advice benchmarking.

In this new position, Grace will drive client engagement, ensure client satisfaction and success, and assist in outreach to prospective clients.

"Grace's experience managing and serving institutional clients, excellent communications skills and financial expertise will support Hearts & Wallets' goal of providing our clients with the highest level of service," John Towle, chief client officer of Heart & Wallets, said. "She will enhance our client relationships by supporting their use of our consumer research and data, aimed at making saving, investing and advice solutions more customer centric."

Grace brings a strong background in corporate communications, investor relations and institutional client management in financial services. Prior to joining Hearts & Wallets, she served in various account management positions with Financial Dynamics, Edelman and Intermarket Communications, where she worked on a range of engagements including crisis communications, ongoing media relations, investor perception studies and the development of quarterly earnings materials.

Grace holds a BA in comparative literature from the University of Pennsylvania.

About Hearts & Wallets

Hearts & Wallets is the market research and benchmarking firm that specializes in how consumers save, invest and seek financial advice. Leading firms rely upon Hearts & Wallets thought-leadership research reports, software and benchmarking to make their saving, investing and advice solutions more consumer-centric. For more information visit www.heartsandwallets.com.

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