

PRIVATE WEALTH OFFICE
Tolland, Connecticut



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Overview | Design Strategy | Key Spaces | Details | Outcomes

Project Overview

Establish a second office that would deliver the same trusted client experience while supporting the firm’s continued growth.

Project Size
Approximately 1,700 SF

Industry
Private Wealth Management

Completion
2023

Services Provided

Interior Design
Space Planning

Furniture Specification
Procurement

Lighting Selection
Art & Accessories

Project Management
Installation Coordination

THE CHALLENGE

The project involved transforming two separate office suites into a unified environment that would support the firm's continued growth while maintaining a consistent client experience across locations.

Four primary challenges guided the design strategy:

1

The first challenge involved combining two separate office suites into a single, cohesive workplace. Prior to occupancy, the client recognized an opportunity to reimagine the space as one unified environment that would better support collaboration, workflow, and future growth. The design needed to create a natural connection between the suites while ensuring the office functioned as a seamless and integrated whole.

2

The second challenge involved creating a dedicated operational workspace to support staff. Administrative functions needed a more organized and efficient work area that would remain accessible while minimizing visual distractions within client-facing spaces.

3

The third challenge centered around meeting capacity. The existing conference room was not large enough, or private enough, to support the firm's growing needs for client meetings, presentations, and team gatherings. The goal was to maximize seating capacity while maintaining comfort and functionality.

4

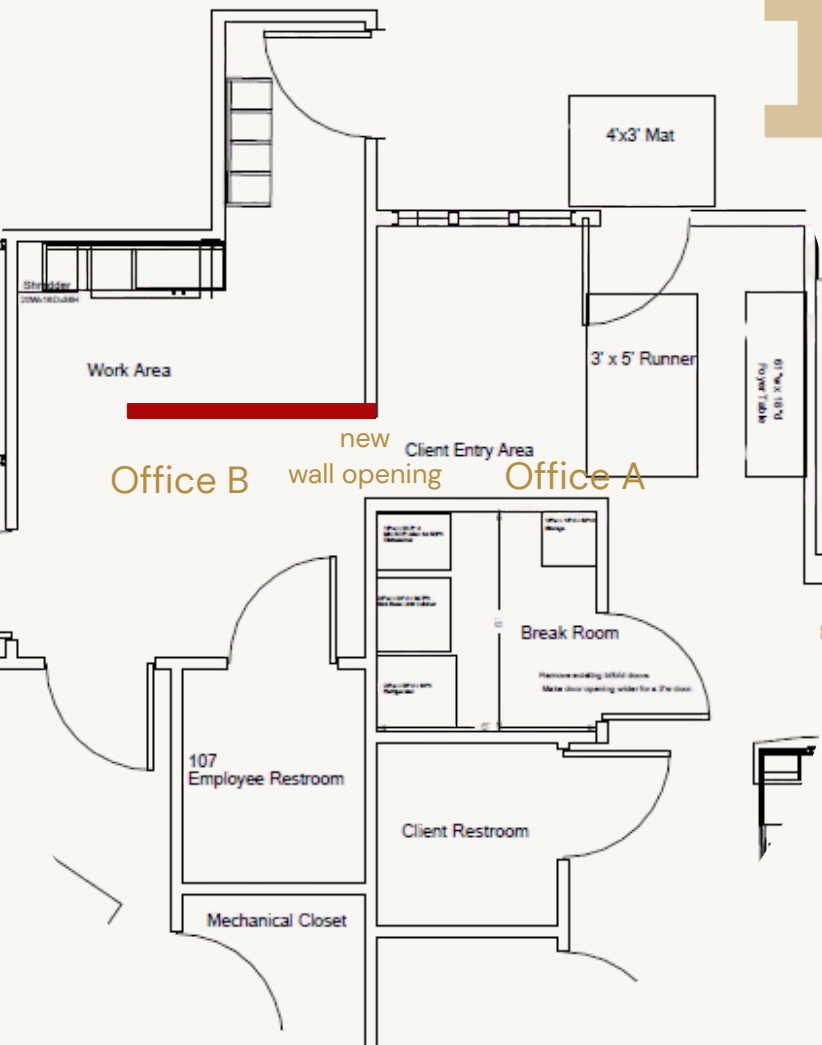
The fourth challenge focused on the overall atmosphere of the office. The client wanted a hospitality inspired environment that balances professionalism with the comfort clients associate with residential interiors, while maintaining consistency with their flagship office.

DESIGN SOLUTIONS

By creating a new wall opening between Office A and Office B, we established a seamless passage between the two suites, allowing the office to function as one integrated workplace.

1

By creating a new wall opening between the two suites, Office A and Office B, we established a seamless passage between spaces and allowing the office to function as one integrated workplace.



New wall opening connecting Office A and Office B to create one unified workplace.



2

A strategically placed partition wall created a dedicated administrative workspace, improving organization and workflow while discreetly screening day-to-day operations from client-facing areas.



THE TRANSFORMATION

3

To maximize meeting capacity, walls were removed to create a larger conference room. A boat-shaped conference table, paired with a 42-inch round table featuring integrated power, comfortably accommodates up to sixteen attendees while preserving flexibility for larger gatherings.



4

Throughout the office, furnishings, finishes, lighting, and accessories were selected to create a polished, professional environment with the warmth and comfort of a residential interior, while remaining consistent with the firm's flagship office

The result is a workplace that balances sophistication, functionality, and hospitality.

PROJECT OUTCOMES

Supported the successful launch of the firm's first satellite office.

Established a consistent and professional brand presence in a new market.

Created a cohesive workplace by seamlessly integrating two separate office suites.

Expanded meeting capacity to better support client engagement, presentations, and team collaboration.

Improved day-to-day operations through a dedicated administrative work area.

Balanced professionalism, hospitality, and functionality to elevate both the client and employee experience.

Delivered a workplace that reflects the firm's culture, values, and commitment to personalized service.

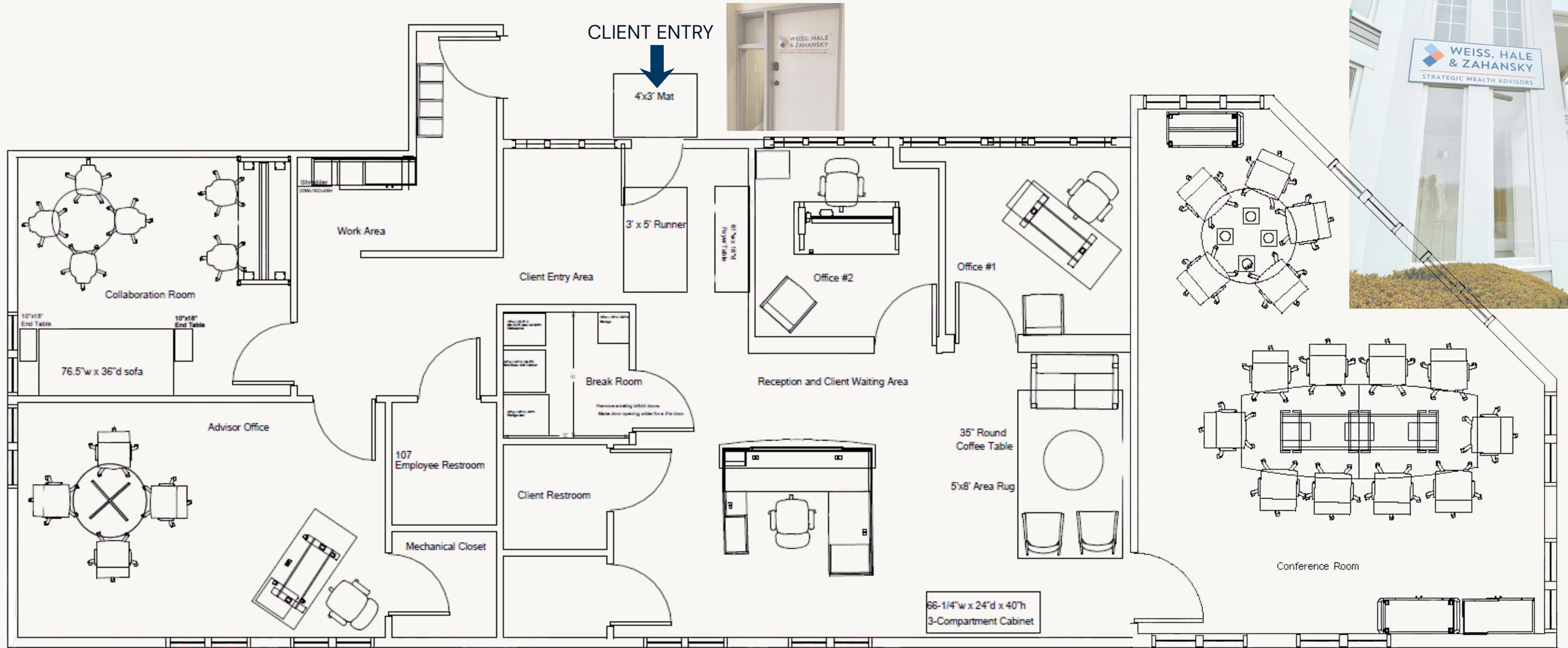
Successfully managed the project remotely from Miami, Florida.



Office A



NEW FLOOR PLAN | COMBINED SUITES | 1,700 SF



A POLISHED, PROFESSIONAL CLIENT ENTRY

PRIOR TO RENOVATION



RECEPTION & CLIENT SEATING AREA

PRIOR TO RENOVATION



WELCOMING RECEPTION



CLIENT LOUNGE

CONFERENCE ROOM | RENOVATION IN PROGRESS



CONFERENCE ROOM | COMPLETED RENOVATION

A Flexible Meeting Environment



CONFERENCE ROOM | COMPLETED RENOVATION



ADVISOR OFFICE | COMPLETED RENOVATION



TEAM COLLABORATION ROOM | COMPLETED RENOVATION



ADMINISTRATIVE WORK AREA | COMPLETED RENOVATION



PRIVATE OFFICES | COMPLETED RENOVATION



WORKPLACE EXPANSION AND OFFICE DESIGN

Comprehensive Design. Thoughtful Execution.

Shelly Rose Consulting and Design helps private wealth firms create workplace environments that support growth while maintaining a consistent and trusted client experience. Through thoughtful space planning, furniture selection, lighting, artwork, and project coordination, existing offices can be reimaged to improve workflow, expand meeting capacity, and create a more cohesive environment for both clients and employees.

Capabilities

Interior Design,
Office Expansion Planning
Space Planning
Furniture Specification
Reception and Client Seating
Conference Room Design
Administrative Work Areas
Private Office Design
Lighting Selection
Art and Accessories
Materials and Finishes
Procurement
Project Management
Installation Coordination
Remote Project Management

Thoughtfully designed workplaces that support growth, strengthen relationships, and reflect the firm behind them.



Private Wealth Offices

DESIGNED TO

INSPIRE *Confidence.*

FOSTER *Trust.*

REFLECT *Success.*

Creating workplaces where relationships flourish, performance thrives, and success endures.

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