

PRIVATE WEALTH OFFICE

Pomfret, Connecticut

SHELLY ROSE CONSULTING AND DESIGN



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Overview | Design Strategy | Key Spaces | Details | Outcomes

Project Overview

A comprehensive renovation and expansion of a private wealth management firm's flagship office designed to support future growth while enhancing the client experience, strengthening brand identity, and creating an environment centered around trust, comfort, and connection.

Through thoughtful planning, research, and collaboration, the project transformed an existing office into a hospitality-inspired destination that reflects the firm's values, culture, and commitment to personalized financial guidance.

Project Size	Industry	Completion
Approximately 4,200 SF	Private Wealth Management	2025

Services Provided

Interior Design	Furniture Specification	Lighting Selections	Project Management
Space Planning	Procurement	Art & Accessories	Installation Coordination

Project Highlights

- 4,200 SF renovation and expansion
- Research-driven design informed by wealth management psychology
- Hospitality-inspired client experience
- Strategic brand integration and client wayfinding
- Preservation and restoration of original architectural elements
- Custom furnishings and finish selections
- Flexible conference and event space
- Comprehensive procurement, installation, and project management
- Successfully managed remotely from Miami, Florida

THE CHALLENGE

As the firm continued to grow, the office presented an opportunity to better align the physical environment with the level of service, professionalism, and personalized attention clients had come to expect.

The project required a thoughtful balance between preserving the character of the original building and creating a modern environment that supported both client engagement and daily operations. Additional space was needed to accommodate growth while maintaining a cohesive experience throughout the office.

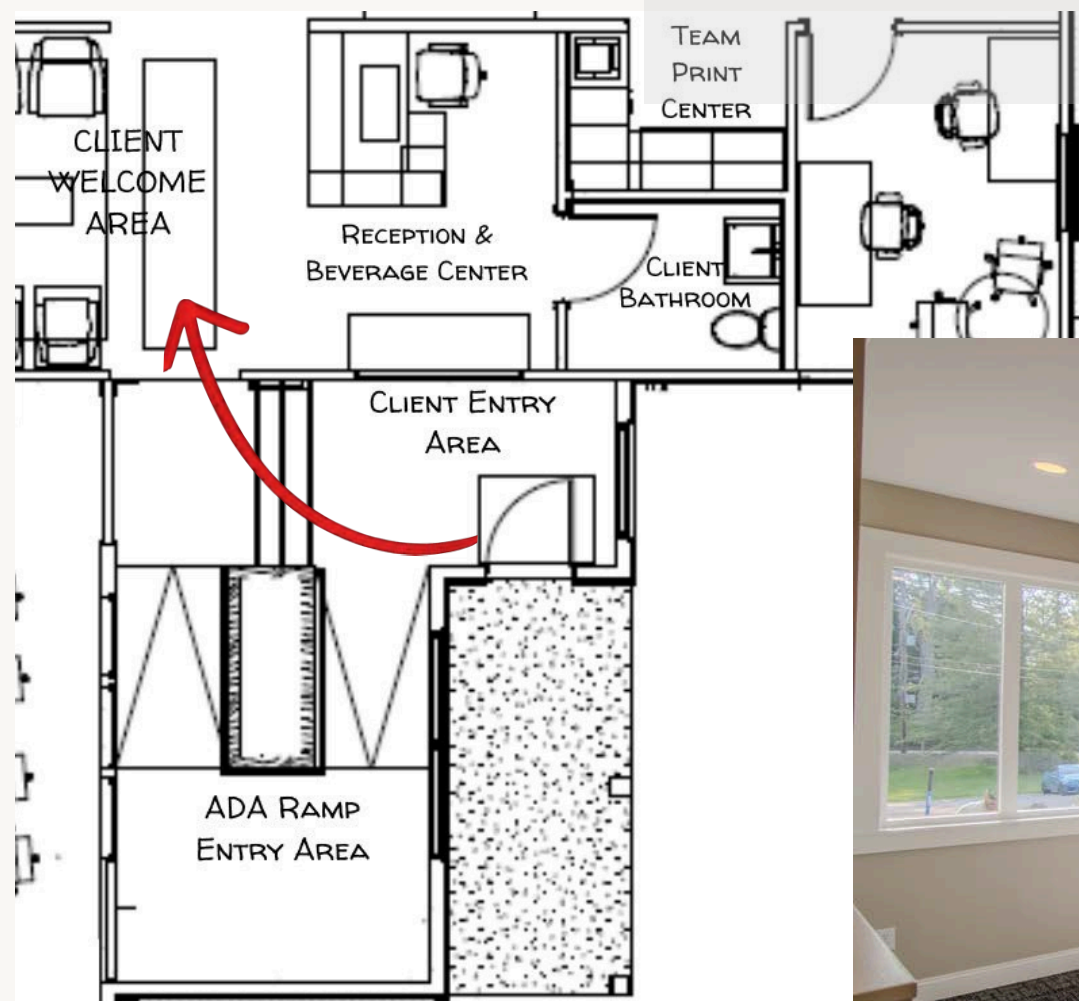
Client Arrival Experience

Strengthened:

Wayfinding

Brand Presence

A key challenge involved the client arrival experience. Although visitors entered through an open and inviting client wing, the reception area was not immediately visible from the point of entry. This created uncertainty regarding where clients should go upon arrival and represented an opportunity to strengthen both wayfinding and brand presence.



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Trust begins long before the conversation starts.



Prior to beginning the design process, Shelly Rose Consulting and Design conducted extensive research into the *psychology of wealth management environments* and the role the built environment plays in *fostering trust, comfort, communication, and meaningful client relationships*.

These findings became the foundation for the project's design strategy and informed decisions throughout the office, from space planning and material selections to client engagement areas and advisor workspaces.

Advisor-Client Meetings in Non-Traditional Office Styles

Alternative seating environments that signal safety, comfort, and trust.

Sofa

Creates environment for client to feel:

- relaxed
- comfortably supported
- connected
- non-invasive

Round Table

Fosters:

- accommodating slightly larger groups, while maintaining engaging conversations
- sharing of information
- easy communication

High Back Arm Chairs

Provide:

- solid support
- comfortable area to place arms
- protection of personal space

Timeless and quality furnishings constructed of solid wood, genuine leather, and soft upholstery similar to what a client may have in their home.

THE DESIGN SOLUTION

Drawing inspiration from hospitality, residential design, and behavioral principles, the office was thoughtfully designed to support both client engagement and advisor productivity. Every element, from the arrival experience and meeting spaces to furniture selections, lighting, and materials, was chosen with the intention of creating an environment that feels welcoming, professional, and comforting.

To enhance the client journey, Shelly Rose Consulting and Design carefully evaluated how visitors experienced the space from the moment they entered the building.

Strategic branding elements, the firm's mission statement, core values, and imagery were thoughtfully incorporated throughout the arrival sequence, naturally guiding visitors toward reception while creating an immediate sense of familiarity and connection.

These carefully curated touchpoints transformed the arrival experience into an extension of the firm's brand, allowing clients to immediately engage with the people, values, and culture that define the organization.



The design also sought to honor the integrity of the original building. A local craftsman was engaged to refinish the existing wide plank flooring, while new flooring was custom milled, stained, and installed to seamlessly blend with the historic materials.

This approach preserved the warmth and character of the original structure while allowing the renovated and expanded spaces to feel cohesive and intentional.

KEY DESIGN FEATURES

Hospitality-inspired reception and welcome area
Branded client arrival experience
Strategic wayfinding and visual cues
Mission statement and values integration
Custom beverage center
Flexible conference and event space
Private advisor offices
Ergonomic workstations
Layered lighting design
Custom furnishings and accessories
Acoustical considerations for privacy and comfort
Curated artwork and styling
Preserved architectural character and original wide plank flooring



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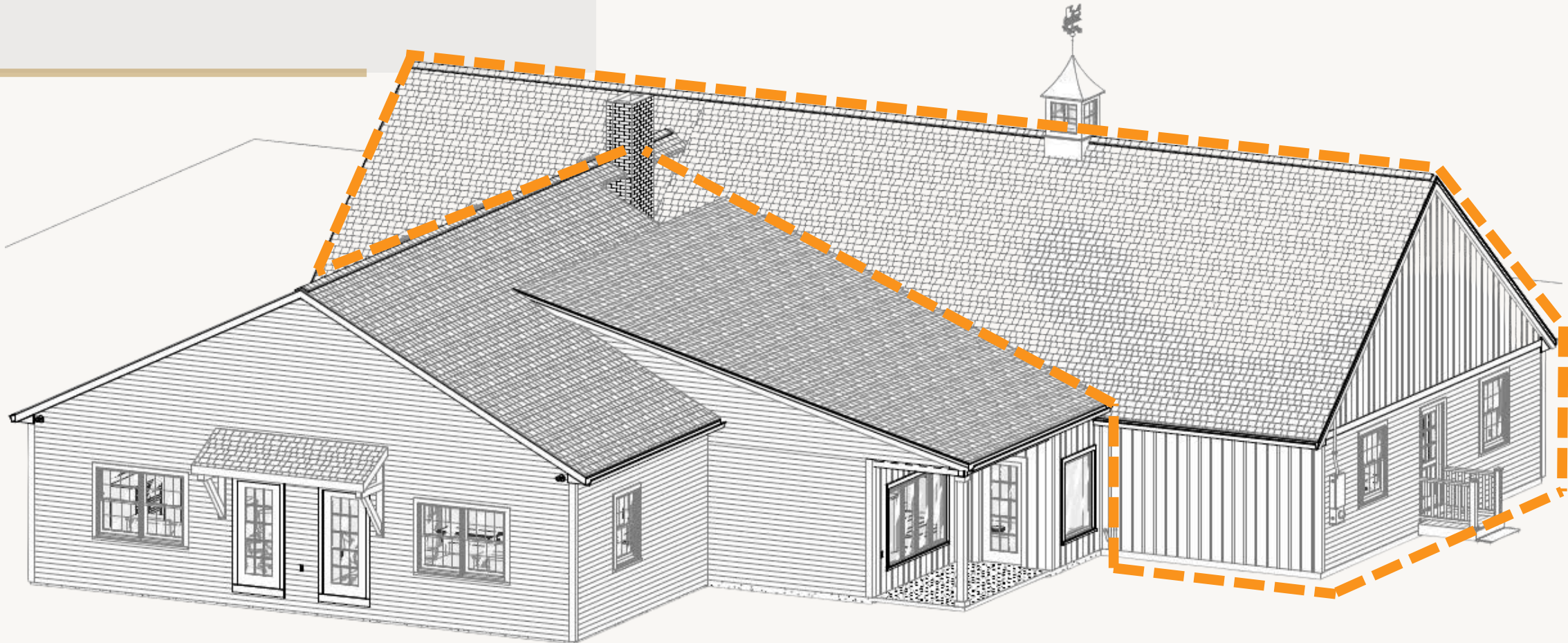
PROJECT OUTCOMES

Elevated the client experience from arrival through consultation
Strengthened brand identity and client engagement
Improved functionality and workflow for advisors and staff
Expanded capacity to support future growth
Successfully blended historic character with modern functionality
Created welcoming spaces that support trust, conversation, and relationship building
Delivered a cohesive environment that reflects the firm's culture, values, and commitment to personalized service



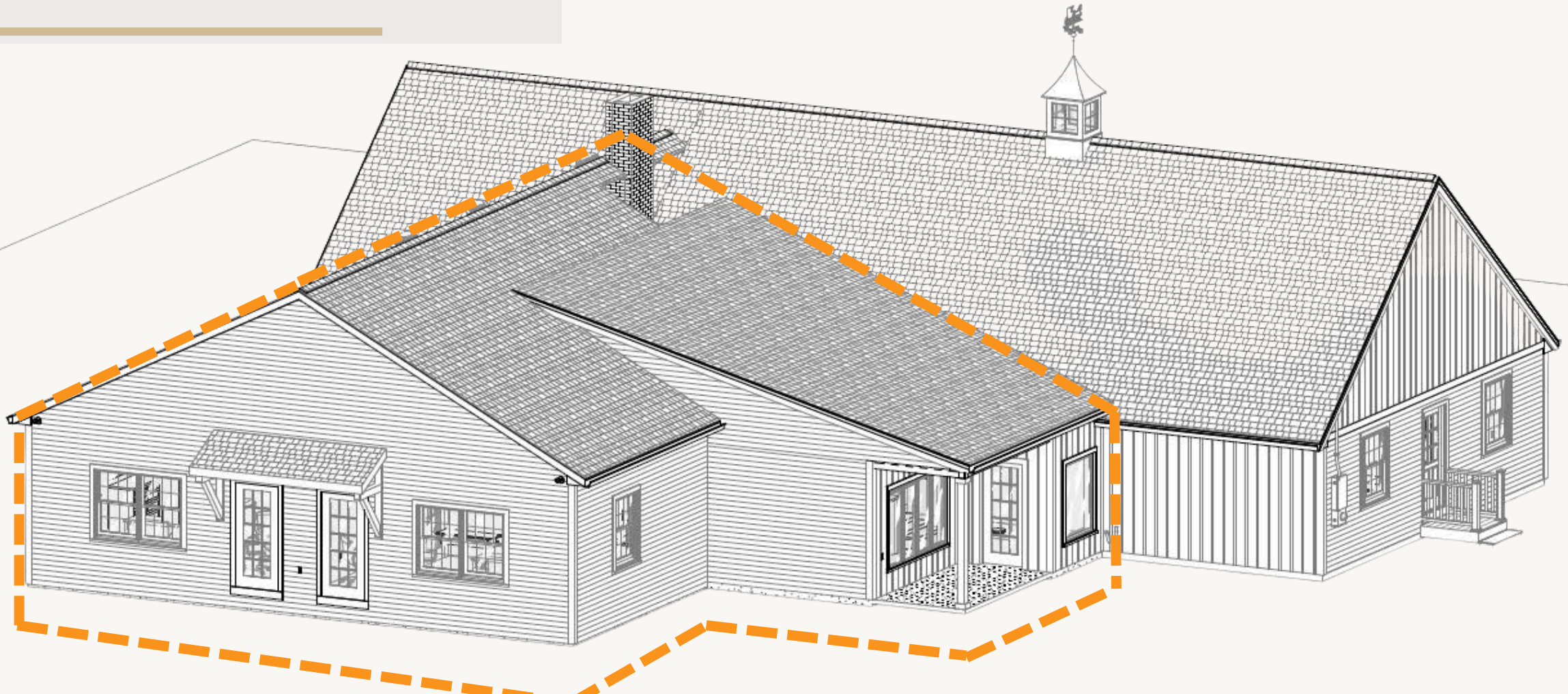
Renovation

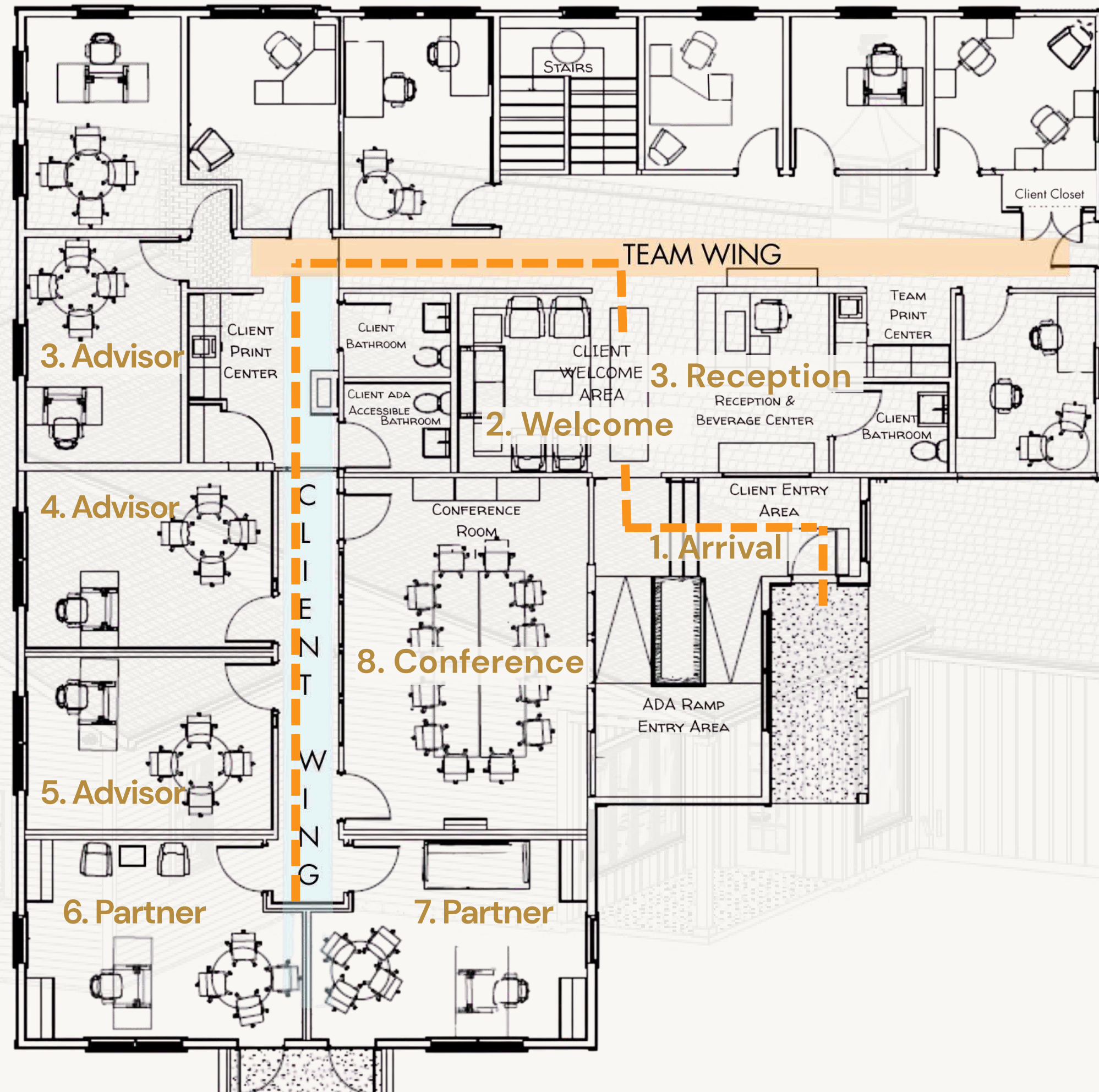
2,130 Square Feet



Expansion

2,130 Square Feet





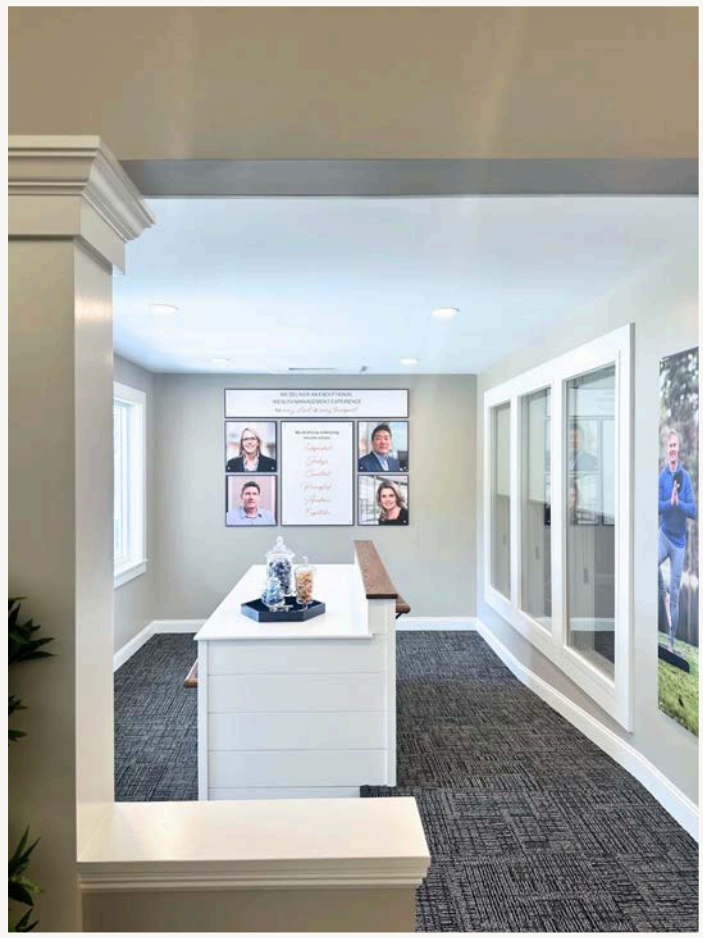
CLIENT ARRIVAL *Building Trust*

WE DELIVER AN EXCEPTIONAL
WEALTH MANAGEMENT EXPERIENCE
for *every client* at *every touchpoint*



We do this by embracing
six core values.

Independent
Strategic
Consistent
Principled
Academic
Empathetic



WELCOME
Conversations



Arrival Experience

Exceptional First Impression



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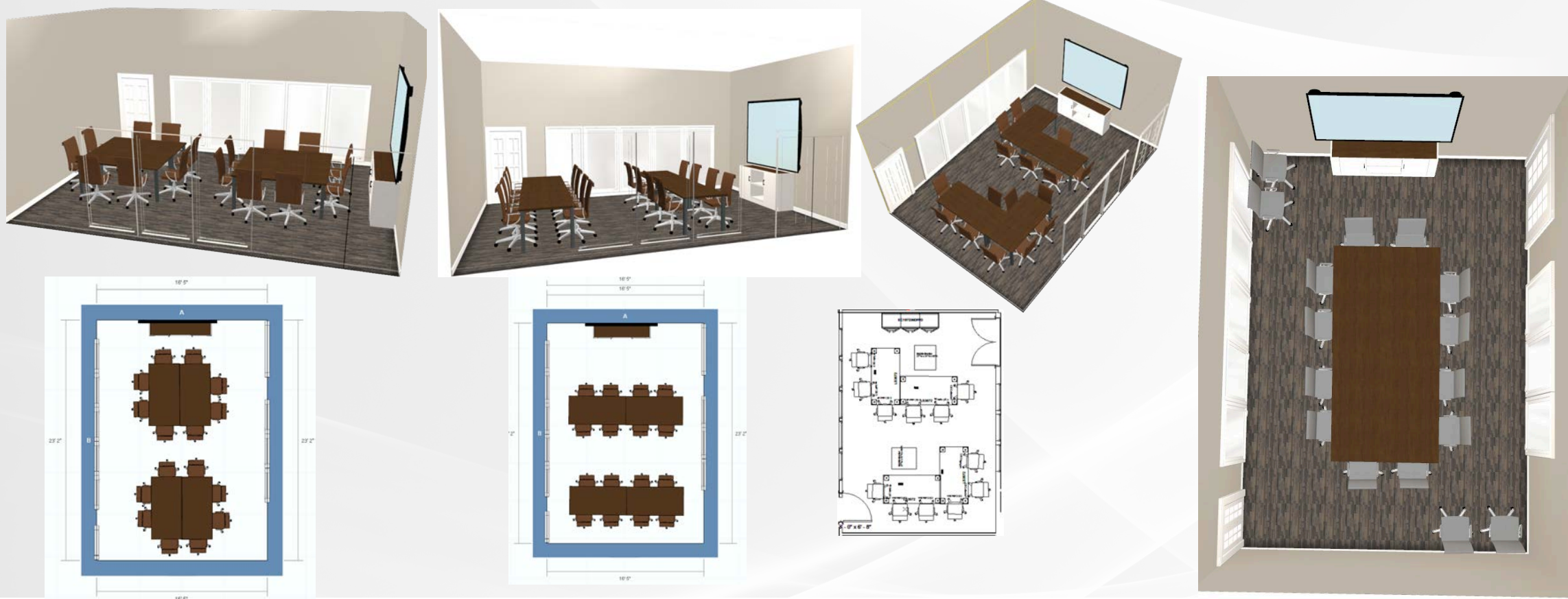


Meeting Space

Collaboration · Adaptability



Versatile Meeting Space



Four solid maple wood tables with locking casters, and center pop-up power units, to accommodate up to 16 people and offer multiple room configurations for client meetings, staff training, and events.

- Cathedral ceiling.
- Wood beams
- Shiplap accent walls at each end of the room
- Walls of windows for transparency (with privacy shades).
- Plank carpet tiles that resemble weathered wood while providing acoustic performance.
- State-of-the-art technology.



ADVISOR ENVIRONMENTS

Continuity of Trust



ADVISOR SPACES

Relationship Focused



ENHANCED ACCESS TO LOWER LEVEL

Improved Circulation

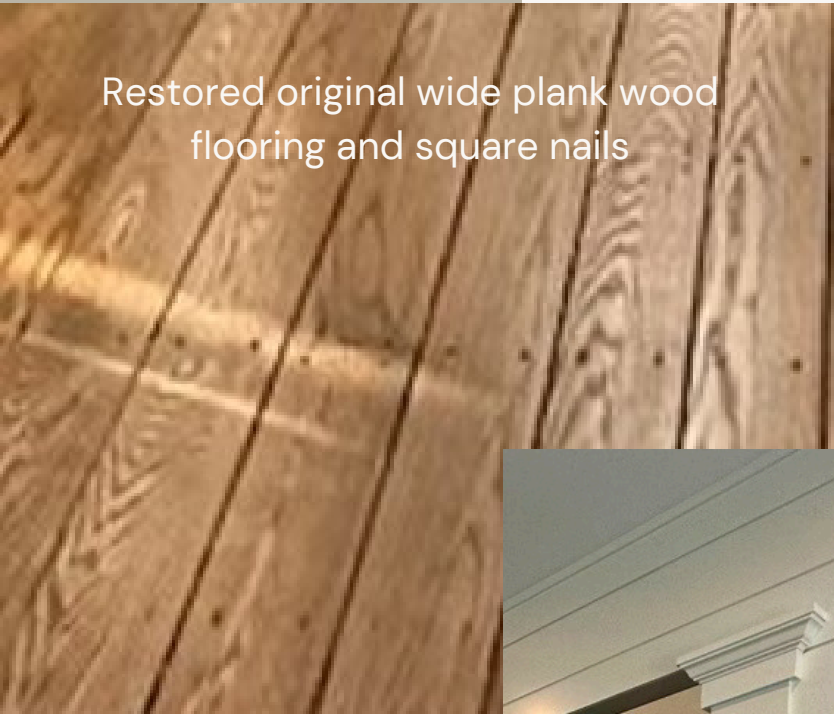
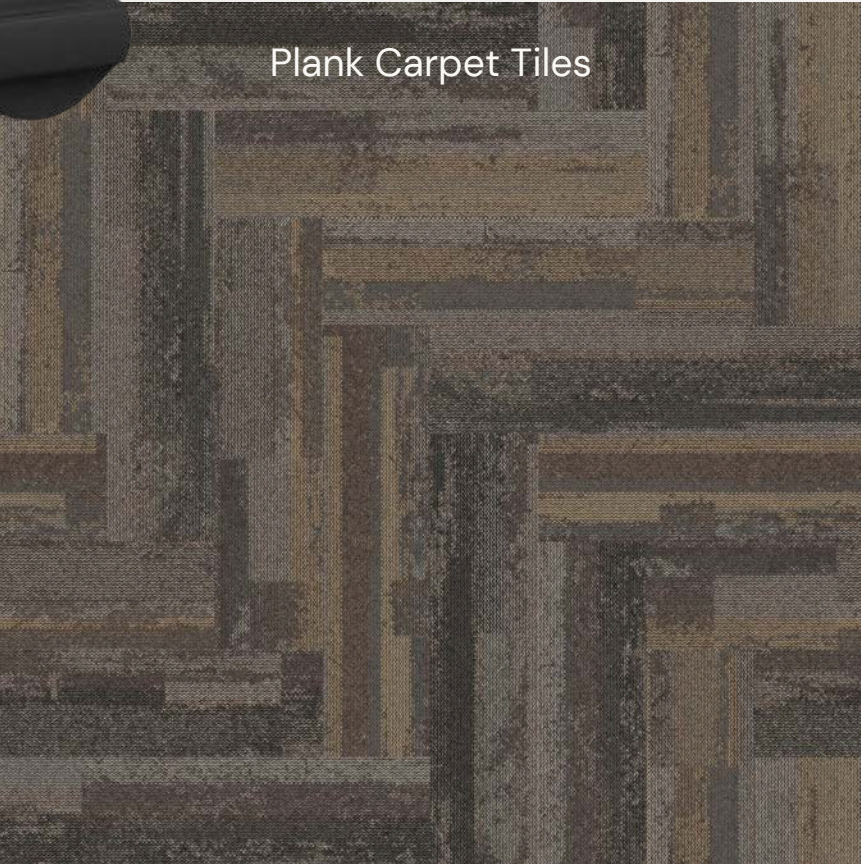


FLOORING, MATERIALS & ARCHITECTURAL FEATURES

Sherwin Williams
Amazing Gray
SW 7044



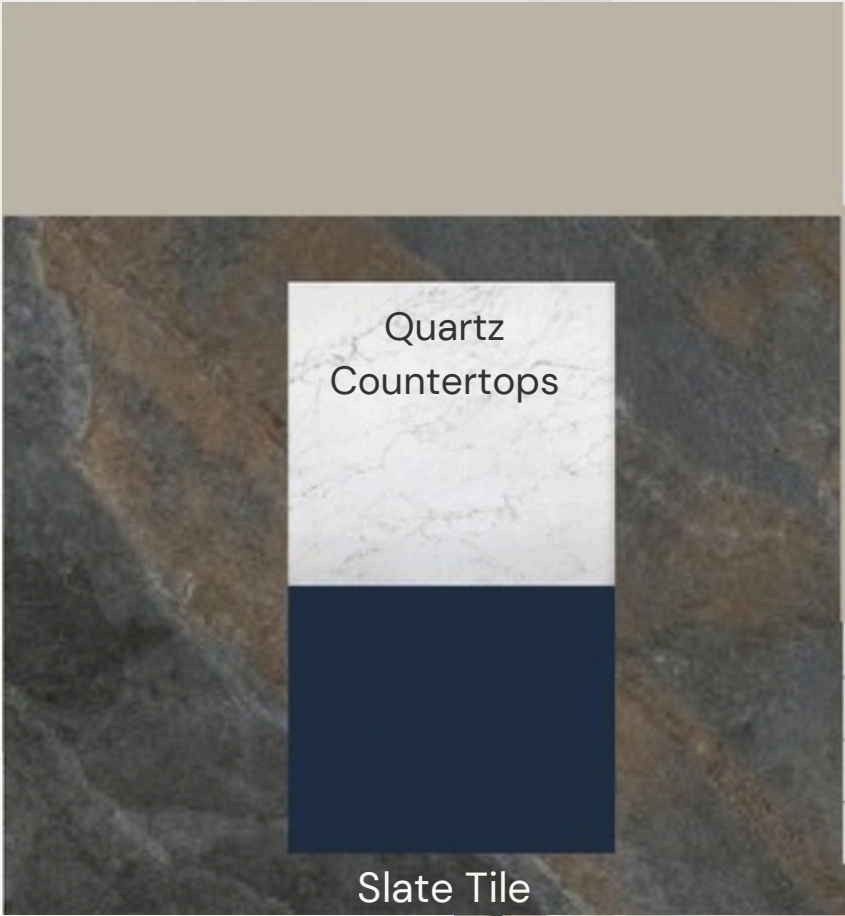
Plank Carpet Tiles



Restored original wide plank wood flooring and square nails



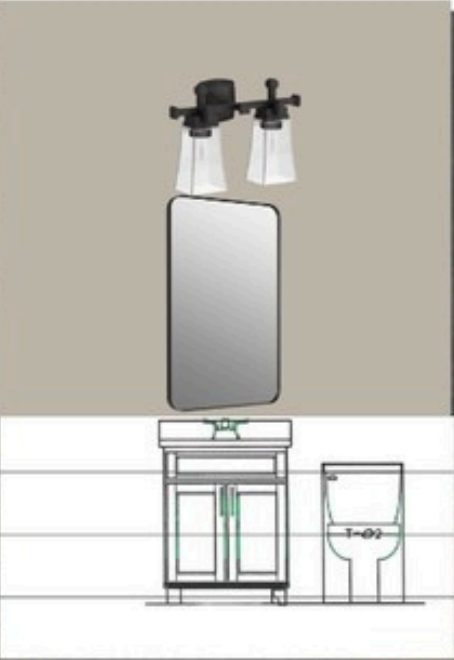
Columns • Shiplap Accents



Quartz
Countertops

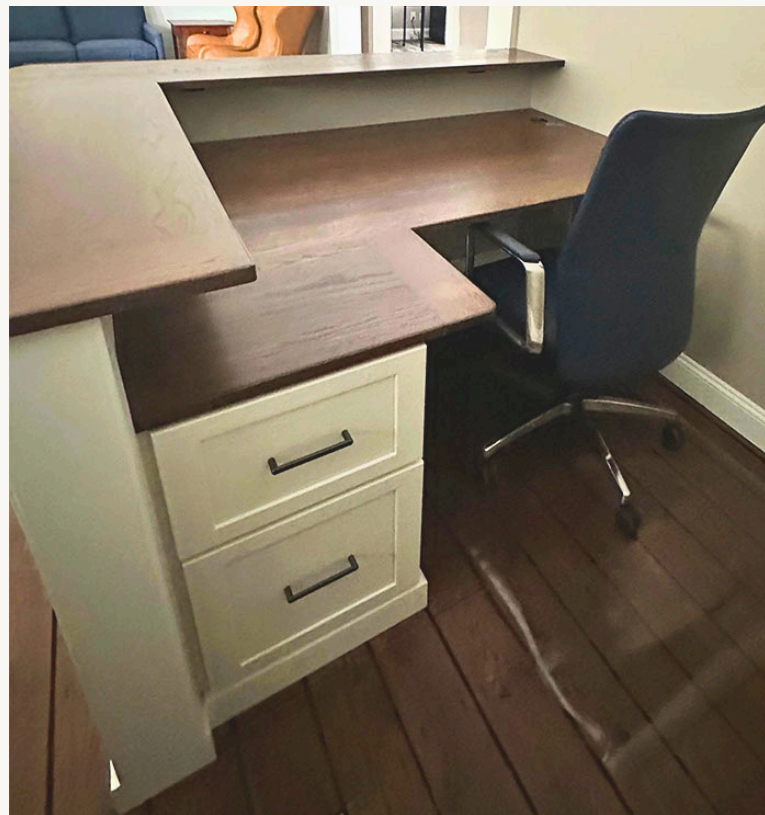
Slate Tile

Kohler Lighting
and Fixtures



DESIGN DETAILS

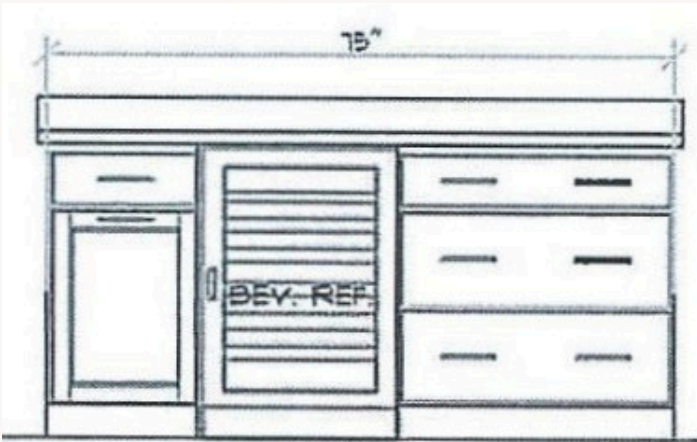
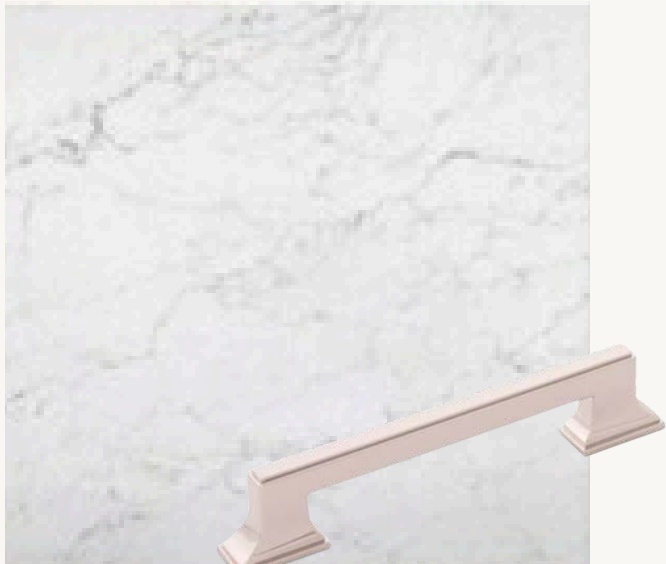
Shiplap • Oak • Pewter



Leather • Chrome



Quartz • Custom Cabinetry • Sub-Zero • Miele • Satin Nickel



RECEPTION & HOSTILITY

ART • ACCESSORIES • TEXTILES

Researched Design to Enhance Client Experience

Original Oil Painting



Seeded Glass • Shantung



Local Artist

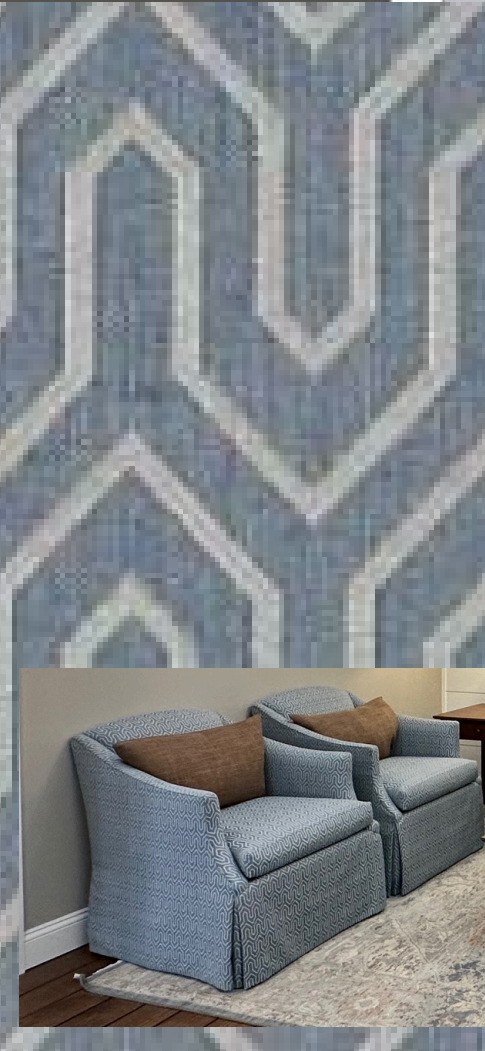
Shaker Tables • Local Craftsman



Hand Knotted Wool



Leather, Texture, Pattern

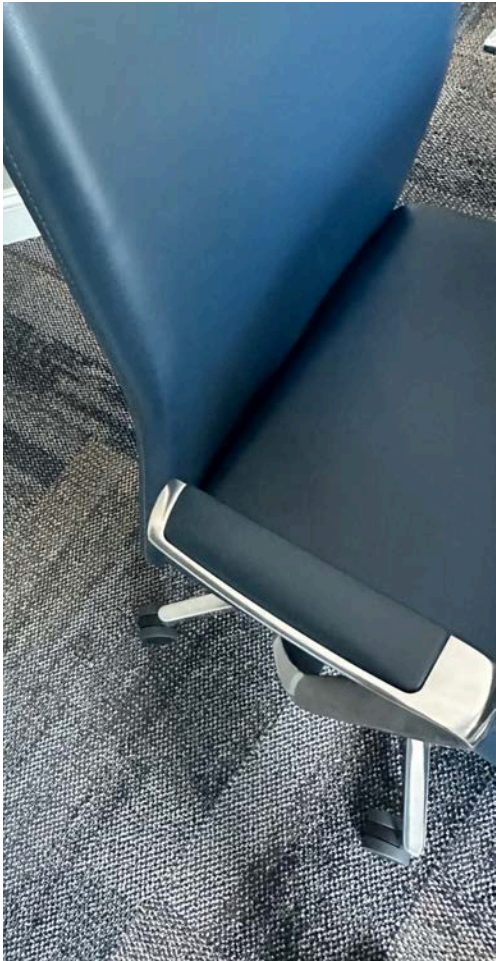


COLLABORATION BY DESIGN

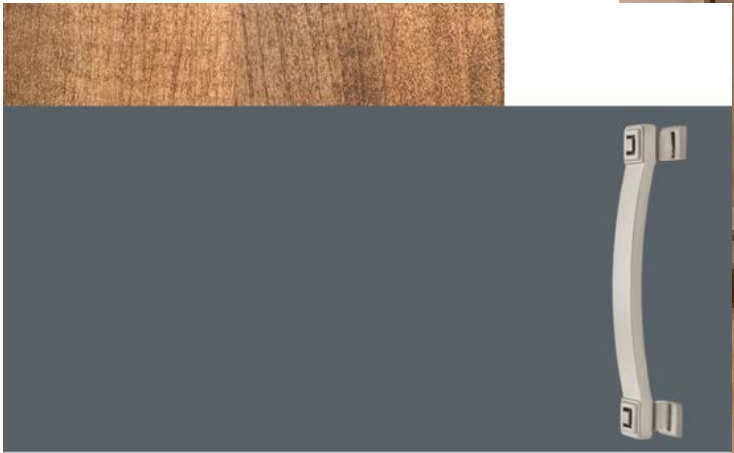
Natural Light • Transparency



Mobility • Flexible Seating Arrangements



Versatile & Adaptable • Sophisticated

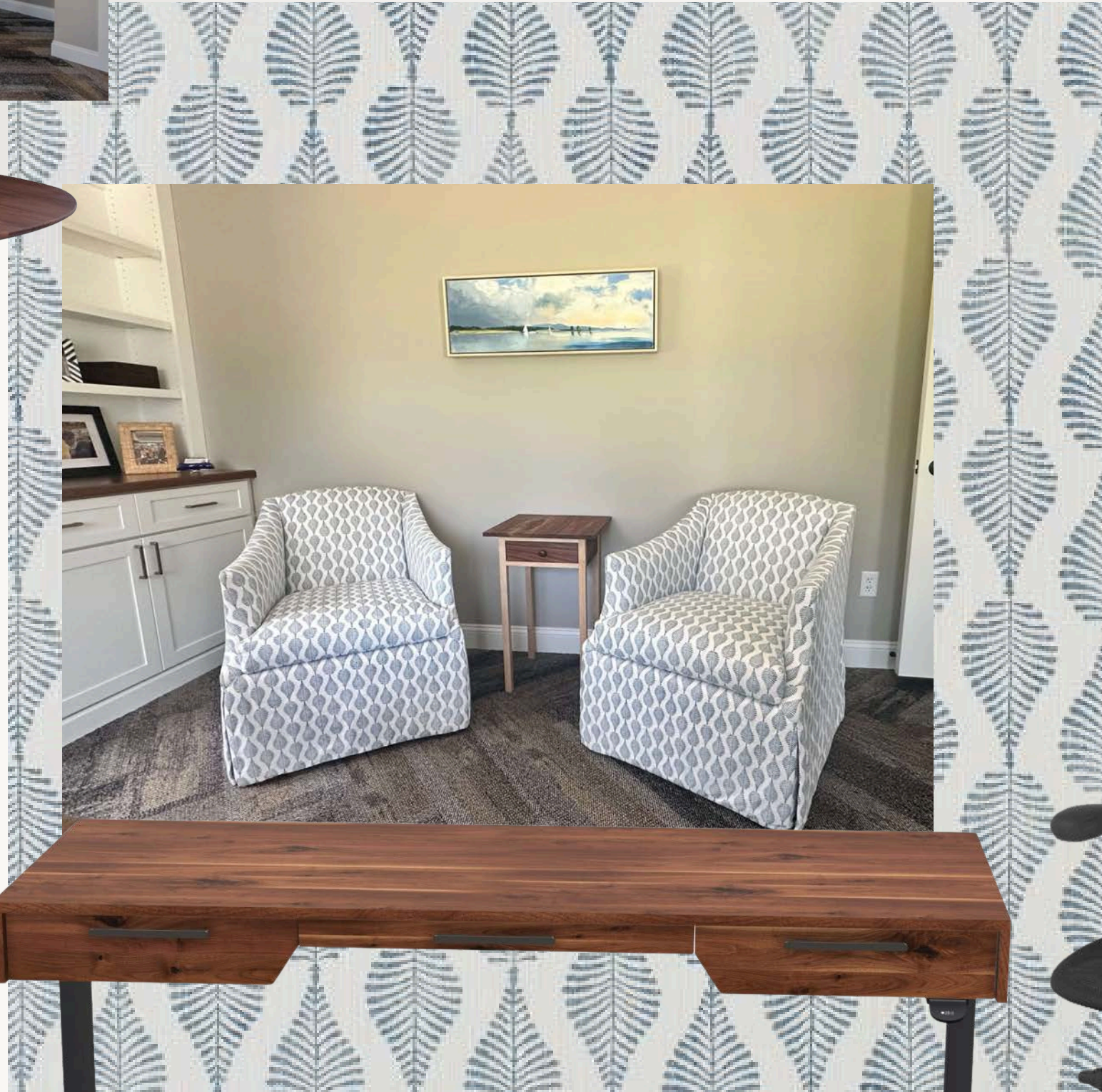


PARTNER OFFICES

Comfort · Confidentiality · Connection



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ADVISOR SPACES

Designed for Trusted Relationships

Inviting • Comfortable • Conversational



Firm Branding

Ergonomic Support & Wellness



Personalized Touches



LIGHTING



Modern Classics



THOUGHTFUL TOUCHES



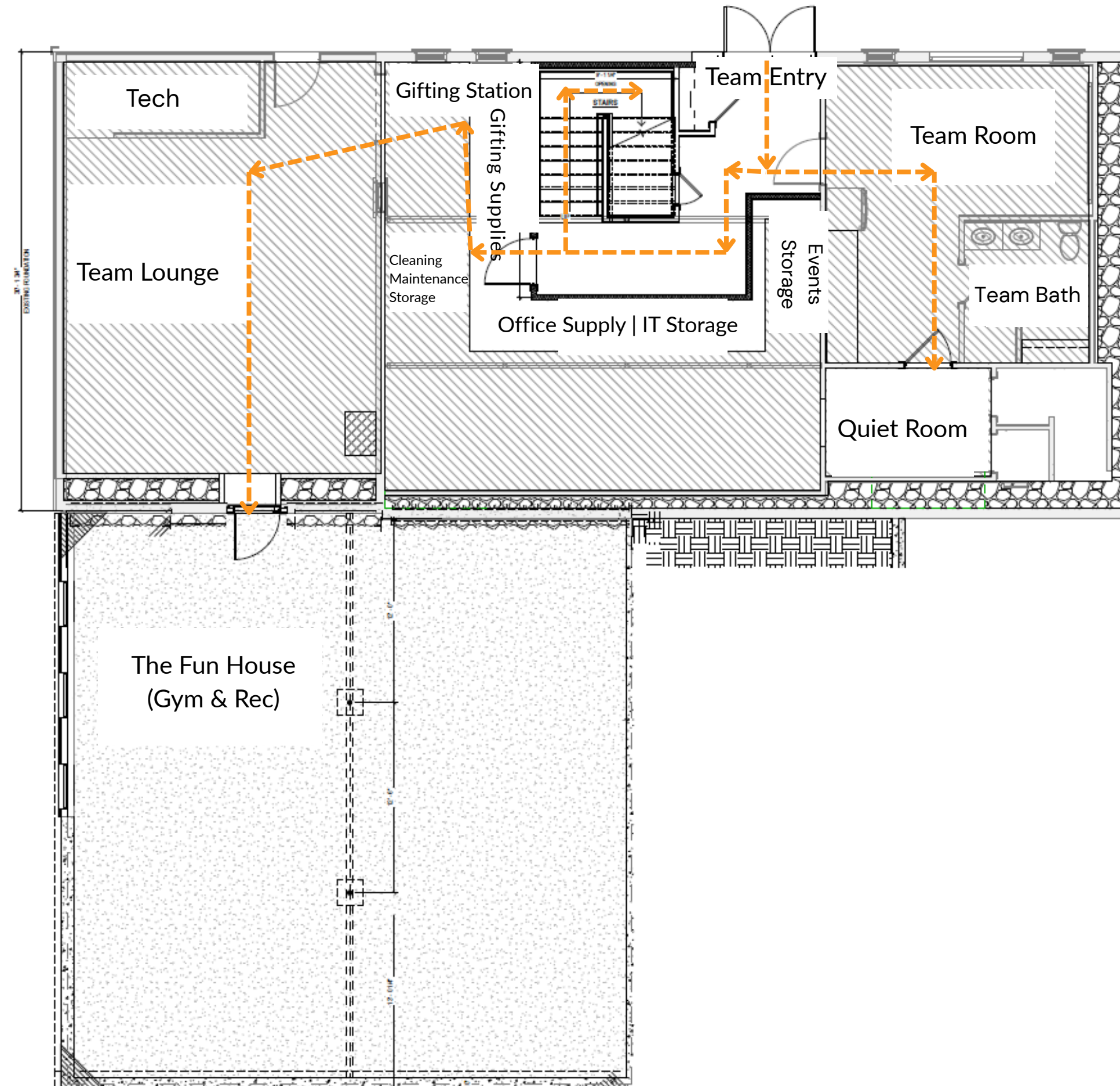
Personal • Memorable



Botanicals • Branded Lindt Chocolate Treats



LOWER LEVEL - DESIGNATED FOR STAFF



LOWER LEVEL | TEAM ROOM | FLEXIBLE SEATING ARRANGEMENT



Pneumatic Height Adjustable Table on Casters

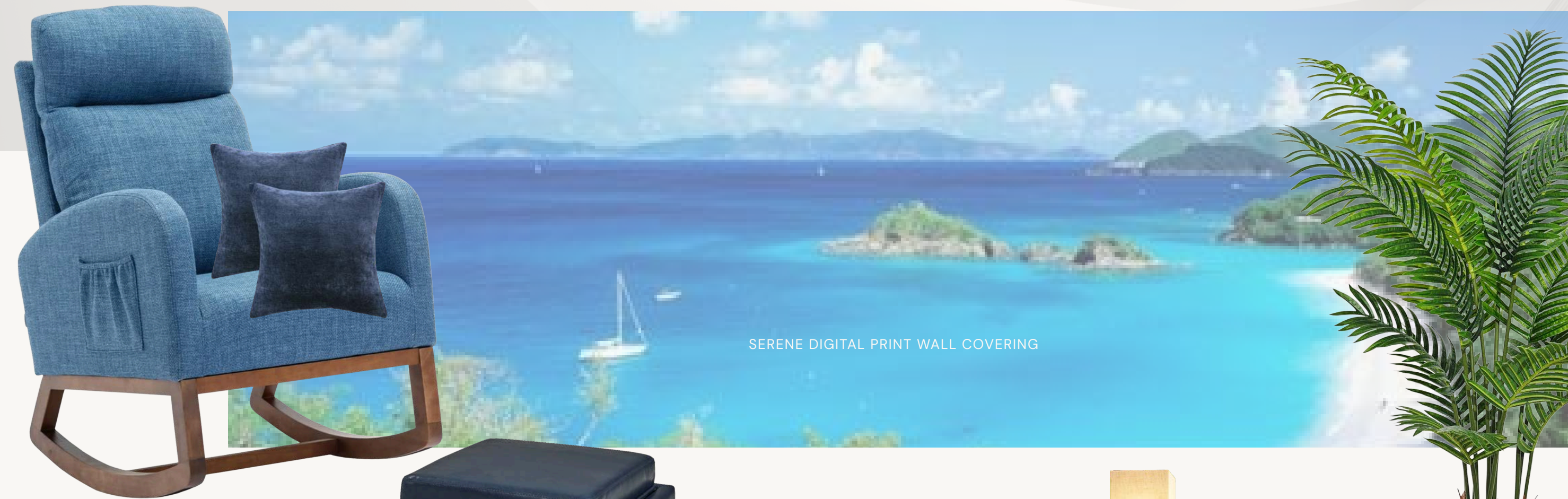
LOWER LEVEL | TEAM COLLABORATION

Connectivity · Workflow

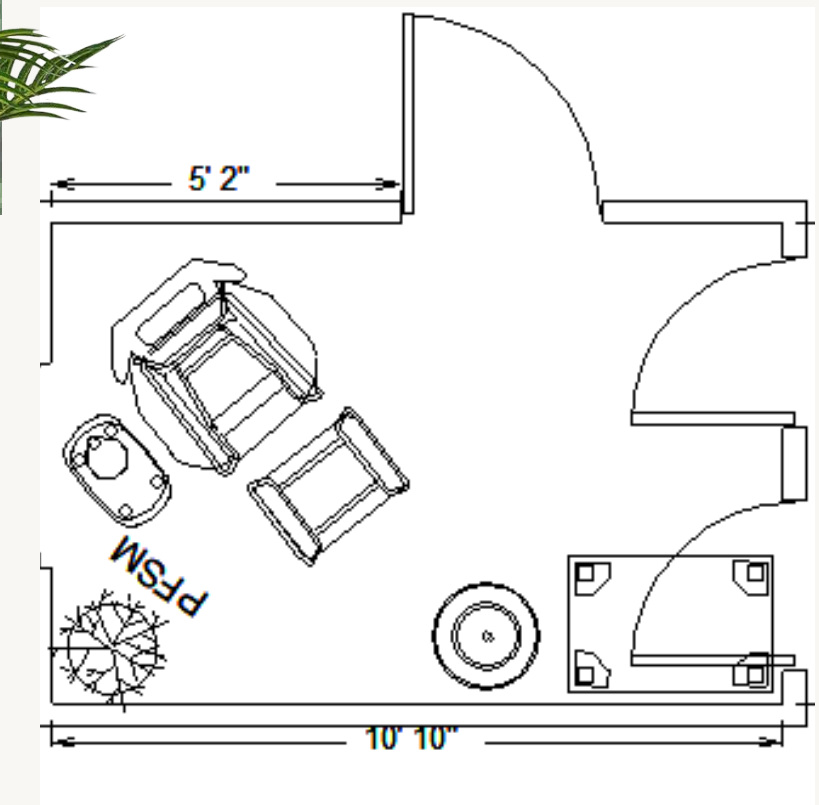
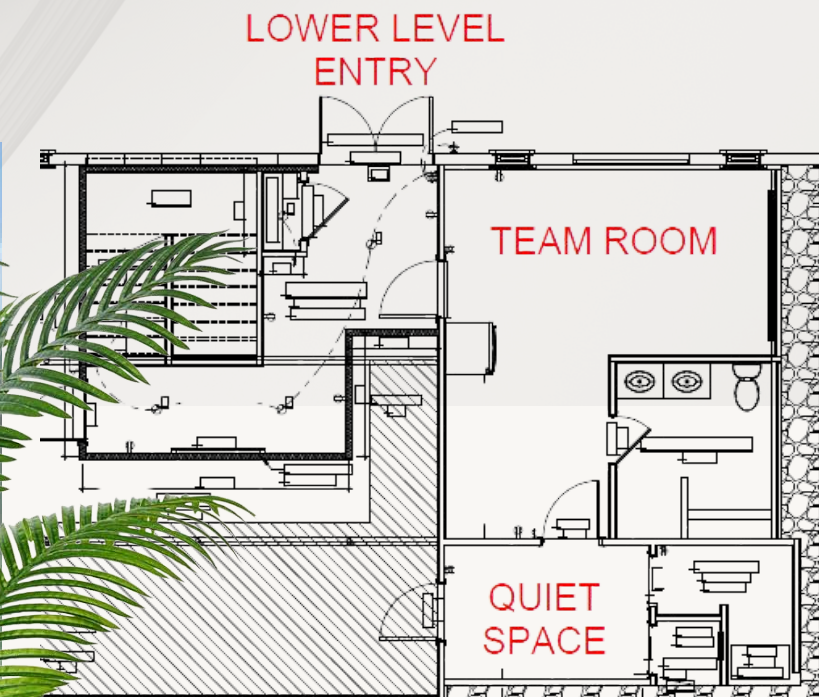


LOWER LEVEL | QUIET SPACE FOR STAFF

Re-Charge · Well-Being



SERENE DIGITAL PRINT WALL COVERING



PRIVATE WEALTH WORKPLACE CAPABILITIES

Comprehensive Design. Thoughtful Execution.

Shelly Rose Consulting and Design creates tailored workplace environments for private wealth firms, family offices, and financial leaders. Each project is designed to support the way the firm operates while creating a polished, welcoming experience for clients and employees.

From space planning and furnishings to lighting, artwork, accessories, procurement, and installation, every element is coordinated to create a cohesive workplace that reflects the firm's culture, values, and commitment to personalized service.

C a p a b i l i t i e s

Interior Design

Workplace Strategy

Space Planning

Furniture Specification

Custom Furnishings

Lighting Selection

Materials and Finishes

Acoustical Solutions

Art and Accessories

Reception and Client Experience Design

Conference and Collaboration Spaces

Private Office Design

Procurement

Project Management

Delivery and Installation Coordination

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



Private Wealth Offices

DESIGNED TO

INSPIRE *Confidence.*

FOSTER *Trust.*

REFLECT *Success.*

Curating workplaces that support relationships, performance, and long-term success.

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