



JEFFREY M. HELF JOINS CUMMINGS & LOCKWOOD AS THE NEW CFO

May 15, 2024

Cummings & Lockwood is pleased to announce that Jeffrey M. Helf has recently joined the firm as the Chief Financial Officer. In this role, he will be responsible for leading the firm's strategic and operational finance and accounting functions, including accounting and reporting, tax and compliance, financial planning and analysis, treasury, billing and collections, risk management, financial systems and budgeting.

"We are very excited to have Jeff join Cummings & Lockwood and believe that he will make a valuable contribution to the firm," noted Laura Weintraub Beck, Chairman and Managing Director. Jeff is based in the firm's headquarters office in Stamford, Connecticut.

Prior to joining Cummings & Lockwood, Jeff was a Senior Vice President and Chief Financial Officer at PCSB Financial Corporation, a \$2.0 billion commercial bank headquartered in Yorktown Heights, New York, where he managed all financial operations of the bank, including accounting operations, treasury/investment functions, financial reporting, SEC compliance, investor relations, strategic planning and budgeting, asset-liability management, retirement plan administration, tax compliance, internal control design and effectiveness, and oversight of financial audit functions (internal, external, regulatory).

In 2020, he was the recipient of the Business Council of Westchester's "40 Under 40 Rising Star" Award.

He received his B.S. in Accounting and his B.S. in Business Administration with a concentration in Finance from Marist College. He also studied abroad at the Chinese University of Hong Kong.

In his spare time, Jeff works as an IRS VITA Program volunteer providing free tax preparation services for low-to-moderate-income individuals and families which are offered by the Connecticut Association for Human Services (CAHS). He has also provided financial literacy coaching and finance career mentoring to students at the high school and college levels.

About Cummings & Lockwood LLC

Founded in 1909, Cummings & Lockwood provides sophisticated legal representation to individuals and families, family offices, closely held businesses, other commercial enterprises and charitable entities. The firm has over 200 attorneys, fiduciary accounts, paralegals and staff located in six offices, including Stamford, Greenwich and West Hartford, Connecticut, and Naples, Bonita Springs and Palm Beach Gardens, Florida.

Our core services include trusts and estates, corporate and finance, litigation and arbitration, and commercial and residential real estate. While many of our clients reside in Connecticut, New York and Florida, we have clients in nearly all 50 U.S. states and in over 20 countries around the world.