

Key Financial's Patti Brennan Ranks #15 Top Women Wealth Advisor in the Nation by Forbes

WEST CHESTER, Pa., April 23, 2020 (GLOBE NEWSWIRE) -- Key Financial, Inc. of West Chester, PA has just announced that their President and CEO Patti Brennan, CFP® has been named by *Forbes* as the #15 Top Women Wealth Advisor in America. *Forbes'* rankings, developed by SHOOK Research are the only advisor rankings with a focus on quality, not just assets under management. The ranking of the Top 1000 Women Wealth Advisors in America started with 32,000 nominations received. The process "is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors with a minimum of seven years of experience and weighing factors like revenue trends, assets under management, compliance records, industry experience and best practices learned through telephone and in-person interviews", explained RJ Shook, President of SHOOK Research.

Through a culture rooted in the tenets of wisdom, perspective and commitment, the Key Financial team provides each client with a personalized financial plan with multiple scenarios, stress tests and what ifs. This approach to concierge service has resulted in a new standard for the client experience. This paired with Patti's unique ability to communicate complex financial concepts through understandable terms, has garnered recognition by *Forbes*, *The Financial Times* and *Barron's* as one of the Top Advisors in America *year after year* for almost two decades. "It is really gratifying to see the hard work of my team be recognized", explained Brennan. "Especially during these very uncertain times, when they are all working remotely on behalf of our clients. I truly have the hardest working, brightest minds in the industry!"

A graduate of Georgetown University, Brennan and her team have been providing wealth management with wisdom and care to their client families, both locally and nationally, for over 30 years. Brennan maintains a close connection in her community by serving on the Boards of the YMCA of Greater Brandywine, University of Pennsylvania Chester County Hospital, Cuddle My Kids and is a former Board member of the Chester County Economic Development Council (CCEDC) and the National Advisory Board.

With assets under management of over \$1 billion, Key Financial Inc. provides comprehensive financial planning and wealth management services and is located at 1045 Andrew Drive Suite A West Chester, PA. For information about the firm's planning services or to speak with Patti Brennan, call (610)429-9050 or visit www.keyfinancialinc.com.

Securities offered through Royal Alliance Associates, Inc., member FINRA/SIPC. Insurance services offered through Patricia Brennan are independent of Royal Alliance Associates, Inc. Advisory services offered through Key Financial, Inc., a registered investment advisor not affiliated with Royal Alliance Associates, Inc.

The *Forbes* ranking of America's Top Wealth advisors, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors with a minimum of seven years of experience and weighing factors like revenue trends, assets under management, compliance records, industry experience and best practices learned through telephone and in-person interviews. There is no fee in exchange for rankings.

The *Financial Times* Top 400 Financial Advisors is an independent listing produced by the *Financial Times* (March, 2016). The FT 400 is based on data gathered from firms and verified by broker-dealer home offices, regulatory disclosures, and the FT's research. The listing reflects each advisor's performance in six primary areas, including assets under management, asset growth, compliance record, experience, credentials and accessibility as identified by the FT. Neither the brokerages nor the advisors pay a fee to *The Financial Times* in exchange for inclusion in the FT 400.

The *Barron's* Winner's Circle Top 100 and the *Barron's* Winner's Circle Top 1200 are select groups of individuals who are screened on a number of different criteria. Among factors the survey takes into consideration are the overall size and success of practices, the quality of service provided to clients, adherence to high standards of industry regulatory compliance, and leadership in "best practices" of wealth management. Portfolio performance is not a factor. Please see www.barrons.com for more information.

A photo accompanying this announcement is available at <https://www.globenewswire.com/NewsRoom/AttachmentNg/b961d9b6-7b03-4d42-976b-c5626a3e6a25>

CEO Patti Brennan



Key Financial, Inc. of West Chester, PA has just announced that their President and CEO Patti Brennan, CFP® has been named by *Forbes* as the #15 Top Women Wealth Advisor in America, and was also named the #2 Top Women Wealth Advisor in Pennsylvania.