

Key Financials' Patti Brennan Ranks #18 in America's Top Female Advisors by Forbes

WEST CHESTER, Pa., March 26, 2021 (GLOBE NEWSWIRE) -- Key Financial, Inc. of West Chester, PA has just announced that their CEO Patti Brennan, CFP® has been named by *Forbes* as the #18 Top Women Wealth Advisor in America and was also named the #2 Top Women Wealth Advisor in Pennsylvania. *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 over 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. Shook added, "Unlike other advisor rankings, SHOOK is not a 'robo-ranker'. His goal is to create rankings of role models-advisors that are leading the way in offering best practices and providing a high-quality experience for clients."

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. With the goal in mind to elevate the client experience, Brennan has created a culture that boasts a client retention rate of 99.5% and is the envy of the industry. "I think our client retention rate, more than anything, recognizes the excellence in the efforts made by every member of my team, on behalf of our clients and the families they love. I am humbled by the confidence our clients put in us every day and promise to do everything we can to warrant their trust."

Boilerplate:

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. Key Financial is a member of Advisor Group, the nation's largest network of independent wealth management firms, and is mission-driven to support the strategic role that advisors can play in the lives of their clients. Patti is invited to speak at conferences throughout America, as well as being the only American advisor invited to present at the 2019 Barron's Economic Summit in London and the 2020 Barron's Economic Summit in Australia. As a former board member of the Chester County Economic Development Council (CCEDC), Brennan has been the Keynote speaker for their Annual Economic Review in January – each year for the past fourteen years. Patti has guided "standing room only" audiences with her wisdom, perspective and practical advice through some of the most challenging times in our country. Brennan is also the host of *The Patti Brennan Show*, a podcast dedicated to helping improve the listener's net worth. It can be found on iTunes, Google Play, Stitcher and Spotify. The show is biweekly and covers timely financial topics as well as economic forecasts and market discussions.

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 "Barron's Winner's Circle Top 100" is a select group 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.

CEO Patti Brennan



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Barron's Top 1200 Financial Advisors 2021



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The Financial Times 300 Top Registered Investment Advisers is an independent listing produced annually by the Financial Times (June 2019). The FT 300 is based on data gathered from RIA firms, regulatory disclosures, and the FT's research. The listing reflected each practice's performance in six primary areas: assets under management, asset growth, compliance record, years in existence, credentials and online accessibility. This award does not evaluate the quality of services provided to clients and is not indicative of the practice's future performance. Neither the RIA firms nor their employees pay a fee to The *Financial Times* in exchange for inclusion in the FT 300.

Photos accompanying this announcement are available at

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