



LEADING WOMEN
IN BUSINESS
PHILADELPHIA

A Holistic Approach to Wealth

*For Key Financial CEO Patti Brennan,
connection, clarity, and caring yield success.*

Beneath the Key Financial, Inc. logo are six simple words in a small font: “Wealth Management with Wisdom and Care.” That quiet message speaks volumes about this renowned West Chester, Pennsylvania firm, and the extraordinary woman at the helm.

A former oncology/ICU nurse—and a devoted mom of four—Key Financial President and CEO Patti Brennan fell in love with financial planning during a senior-year course at Georgetown University. She launched her business in the laundry room of her home soon after. Today, nearly three decades later, Brennan’s brilliant, compassionate, uniquely holistic approach to wealth management has built Key Financial into a company recognized locally and nationally as one of the top financial advisory firms in the United States. Earlier this year, she rose to the No. 33 spot in Barron’s Top 100 Women Advisors in the country. She’s received similar kudos from Forbes, the Financial Times, the Wall Street Journal, and CNBC. Her first book will be published by Forbes in late 2018.

Which brings us to the “wisdom.”

“For many clients, the first appointment with a financial planner can be stressful,” says Brennan. “My job is to listen—just listen. I don’t talk over people. (I learned that in medicine!) Sometimes

clients are embarrassed that they don’t know much about finance, but it is a full-time job to keep on top of all aspects of financial planning. At Key Financial, we take it a step further: It’s not just our job, it’s our passion.”

Using cutting-edge business practices, Brennan and her colleagues walk side by side with their clients, guiding them through life’s financial milestones: marriage, home-buying, babies, college funds, health crises, retirement, and beyond. Through all these—and the inevitable fluctuation of the market—Key Financial’s devoted clients know they have someone in their corner.

“With wisdom comes humility,” says Brennan. “We’re here to give our clients what they want.”

Her voice softening, Brennan recalls a defining moment early in her career: the first time she realized just how important her work was. After years of battling cancer, her beloved father passed away in the family home, surrounded by his wife and children. In the immediate, stunned aftermath, Brennan’s mother asked to speak to her alone. Would she be OK, financially, she asked?

“I said, ‘Mom, you’re going to be fine. This will be seamless,’” recalls Brennan. “But then she asked me, ‘What happens to people whose daughters aren’t financial planners?’ And I realized this is what people want: someone they know and trust to handle these difficult details. Someone who cares.

“Everything we do at Key Financial keeps that focus: We’re not taking care of money, we’re taking care of people.”

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Key Financial’s success, says Patti Brennan, is built on her belief in the power of five “force multipliers”—tasks that lead to financial intelligence.

1. Create a visualized future, rich with specifics.
2. Automate savings, aligning them to your vision.
3. Be protected from unforeseen events and taxes.
4. Avoid 10 key money mistakes.
5. Optimize your life and your human capital.



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