

Key Financial's Patti Brennan Ranks #2 in State by Forbes

WEST CHESTER, Pa., Feb. 17, 2021 (GLOBE NEWSWIRE) -- Key Financial President and CEO, Patti Brennan, has just been named by Forbes as #2 Best-In-State Wealth Advisors for 2021. This is a move up the list from last year's #3 spot. Forbes partnered with Shook Research in reviewing than 32,000 nominations nationally to determine this list of the nation's top financial minds. Nominees are judged based on an algorithm of both qualitative and quantitative data. Advisors must have a minimum of seven years' experience to qualify and are also weighed on additional considerations such as revenue trends, compliance records and assets under management. R.J. Shook, the President of Shook Research explains, "Here's what our research has found: the very best advisors are laser focused on having a positive impact on their clients' lives. They want to add meaning and help them live better lives. It is our belief clients are oftentimes better served by *local* representation. Many of the clients we talk to say they consider their advisors and teams like a part of their families, so it's nice to have them close by." Shook Research looks for advisors that are leading the way in offering best practices and providing high quality experiences for their clients.

Patti Brennan is just that type of advisor. Recognized as a thought leader in the industry, is consistently ranked by Forbes, Barron's and the Financial Times as one of the nation's top advisors, Brennan sets the bar for other financial advisory firms looking to build their practice while also providing a premier client experience. "As a member of my team recently said, Key Financial is where financial wisdom and caring meet," states Brennan. "We recently partnered with the MITAge Lab to introduce new technological advancements to our clients to help them age in place longer than they would have dreamed. All of us here at Key Financial take great pride in the fact that we bring the latest research into our financial planning."

While Patti Brennan is known nationally for her comprehensive services, she is also recognized locally as a loving mother of four children and dedicated member of the community. Patti maintains a close connection by holding seats on the boards of various institutions and nonprofits, such as University of Pennsylvania/Chester County Hospital, the YMCA of Greater Brandywine and Cuddle My Kids. 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.

With assets under management of over \$1.5 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.

Boilerplate:

A graduate of Georgetown University, Patti is a Certified Financial Planner with almost 30 years of experience providing financial advice in West Chester, PA. In addition to being President and CEO of Key Financial, Inc. she also serves on the National Advisory Board, is a Board Member of the YMCA of Greater Brandywine and Cuddle My Kids. She formerly served on the Boards of the Chester County Economic Development Council, SEEDCO and Penn Medicine Chester County Hospital. Patti, her husband and their four children reside in West Chester, PA.

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 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. 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.

CEO Patti Brennan



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Forbes Best-In-State Wealth Advisors



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Photos accompanying this announcement are available at

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