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Bartlett Wealth Management Named to Prestigious Barron's Top 50 RIA Firms List

Firm recognized as top independent financial advisor

Cincinnati (Sept XX, 2019) – Bartlett Wealth Management, a Midwest wealth management firm, announced it was named to Barron's prestigious [Top 50 RIA Firms list](#). The award recognizes firms across the nation that demonstrated growth, both organic and through mergers and acquisitions.

This is the first year Bartlett has received this distinction, and follows on the heels of the firm's announcement that it had expanded to Chicago by acquiring Lodestar Investment Counsel, LLC in July. The deal was part of Bartlett's strategic growth plan to expand capabilities that will allow it to continue providing best-in-class service and offerings to clients across the Midwest and beyond.

The ranking comes off the heels of significant growth in RIA's in the last year, with Barron's citing the top firms on their list grew over 40% since last year's ranking. They also expanded the list from the Top 40 Firms in 2018 to 50 in 2019 to reflect the change.

"It's an honor to be recognized by Barron's as one of the top RIA firms in the nation," said Kelley J. Downing, President and CEO of Bartlett Wealth Management. "Our team works diligently every day for our clients to help them identify the purpose of their wealth and what goals they have for their financial future in order to develop a custom plan to help them succeed. The success we have as a firm is important to all of us, because it means success for our clients and they are our top priority."

According to Barron's, in order to qualify for The Top 50 RIA Firm ranking, firms meet the following criteria:

Participation in the ranking is by invitation only. Barron's invites about 200 handpicked firms, who are pre-screened for AUM and revenue levels that will render them competitive for the ranking. Specific criteria all participants must meet:

1. The firm is a formal legal entity [Corporation, LLC or LLP] and employs a formal CEO, along with other C-suite executives.
2. The firm's advisors are client-facing representatives who provide both fee-based investment advice and financial planning services.
3. The firm's advisors are formal employees of the firm, not consultants or affiliates.
4. The firm's advisors report their regulatory assets under management through the firm's corporate ADV.
5. The firm provides advisors with technology, compliance and investment resources that foster a consistent client experience throughout the firm's individual advisory practices.

6. The firm serves primarily private-wealth clients. Specifically: a majority [over 50%] of the firm's regulatory assets under management should be attributable to some combination of these three categories of client: (1) individual investors [including mass affluent, HNW and UHNW] (2) charitable organizations/foundations (3) endowments. [For reference, these three categories are captured in the SEC's form ADV as choices (a), (b) and (h) under Item 5.D. Question 2.]

ABOUT BARTLETT WEALTH MANAGEMENT

Bartlett Wealth Management ("Bartlett") a leading Midwestern wealth management firm with offices in Cincinnati and Chicago, provides customized investment management and financial planning services to high net worth families, foundations and businesses throughout the Midwest. Bartlett takes pride in providing clients independent, personalized fiduciary advice through a team of distinguished investment and planning professionals. For more information, visit www.Bartlett1898.com.

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