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Bartlett Wealth Management Named Barron's Top RIA Firm for Fourth Consecutive Year

Firm recognized as top independent financial advisor nationwide

Cincinnati (September 12, 2022) – [Bartlett Wealth Management](#) (Bartlett), a Midwest wealth management firm with offices in Cincinnati and Chicago, was named to the prestigious [Barron's 2022 Top RIA Firms](#) list for the fourth year in a row. Bartlett ranked at number 56 on this year's list.

The award, now in its seventh year, ranks independent advisory companies on both qualitative and quantitative criteria, including assets managed by the firms, technology spending, staff diversity, succession planning and other metrics. Barron's ranks 100 independent firms annually.

According to Barron's, the number of registered investment advisory (RIA) firms in the U.S. increased 41% from 2012 to 2021. Now, there are nearly 15,000 RIAs nationwide. RIAs differ from Wall Street companies like Merrill Lynch, Morgan Stanley and others because they are legally bound by a fiduciary standard, meaning they owe clients a duty of loyalty and care covering all aspects of their relationship, Barron's said.

"We're proud to once again be recognized by the industry-leading top RIA firms list from Barron's in 2022," said James B. Hagerty, CEO of Bartlett. "We prioritize a best-in-class client experience, working collaboratively as a team to help our clients identify the purpose of their wealth, the goals they have for themselves and their families and community, and partnering with them to ensure we create a plan that aligns with their values and goals."

"Working with clients to build resilience and stability is paramount, especially in times of market turbulence," said Bartlett President Holly Mazzocca. "It's an honor to be recognized for the hard work our entire team puts in day in and day out. We pride ourselves on partnering with clients to create and execute personalized plans that are sensitive to their individual needs. We strive to be a holistic resource for our clients. It remains the heart of everything we do."

According to Barron's, participation in Barron's Top 100 RIA Firms ranking is by invitation only and limited to firms that meet the minimum eligibility requirements. As with all Barron's rankings, the organization does not disclose the proprietary formula. Some general guidance on [methodology](#): Participating firms were evaluated and ranked on a wide range of quantitative and qualitative data, including: the assets a firm manages and the revenue those assets generate; regulatory record; staffing levels and diversity; technology spending; succession planning, and more. The ranking is not indicative of the firm's past or future performance. Neither the firm nor

its executives pay a fee to Barron's in exchange for the ranking. Barron's is a registered trademark of Dow Jones & Company, L.P.

To learn more about Bartlett or the team, visit www.Bartlett1898.com.

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ABOUT BARTLETT WEALTH MANAGEMENT

Bartlett Wealth Management ("Bartlett"), a 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.