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Bartlett Wealth Management Named Top RIA Firm by Forbes and SHOOK Research

Firm ranked number 33 out of the top 100 firms in inaugural list

Cincinnati (Nov. 16, 2022) – Bartlett Wealth Management (Bartlett), a Midwest wealth management firm with offices in Cincinnati and Chicago, has been named to the [Forbes/Shook 2022 list of America's Top RIA Firms](#). Bartlett ranked at number 33 on the inaugural list.

Led by a seasoned team of wealth advisors, the firm has continued to grow its assets in recent years. As of 12/31, Bartlett manages \$8.2 billion in client assets.

“This recognition from *Forbes* is a confident reminder that we’re moving the firm in the right direction,” said James B. Hagerty, CEO of Bartlett. “In the survey, we were able to share the big things *and* the little things that Bartlett does to make an impact and create a wonderful client experience. I am fortunate and proud to be surrounded by colleagues who go above and beyond for our clients to meet their aspirations and goals.”

Forbes and SHOOK Research’s ranking of America’s Top RIA Firms includes 100 advisory firms across the U.S. with cumulative assets of \$730 billion. The list is based on an algorithm of qualitative criteria, mostly gained through telephone, virtual and in-person due diligence interviews, and quantitative data. The algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices and approach to working with clients. Ranking is based on 12/31/2022 numbers. Bartlett did not pay a fee to be included in these rankings or for use of marketing materials. More on the methodology can be found [here](#).

This is the second honor of its type for Bartlett in 2022. In September, the firm was named to [Barron's annual list of the top 100 RIA firms across the country](#) for the fourth consecutive year.

“When individuals and families entrust us to manage their assets, we take that work seriously. They are putting their trust in us to help manage their futures and that of their families” said Bartlett President Holly Mazzocca. “Bartlett’s inclusion on this list would not be possible without the incredible team of seasoned professionals who bring a wealth of knowledge and superior client service to the table every day. Our team works together to achieve the growth and success of our firm.”

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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.