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Media contact:
Gina Genco, Scooter Media
gina@scootermediaco.com | (317) 835-1996

Kelley Downing Named to ThinkAdvisor LUMINARIES Class of 2021

Downing recognized for executive leadership driving the wealth, investment and retirement industry forward

Cincinnati (Dec. 23, 2021) – [Bartlett Wealth Management](#) (Bartlett), a Midwest wealth management firm with offices in Cincinnati and Chicago, announced Kelley Downing, Executive Chair, was named to [ThinkAdvisors'](#) LUMINARIES Class of 2021.

The inaugural program honors top-performing industry leaders who produce meaningful results across the finance industry. The class of 2021 features winners in four categories: Diversity & Inclusion, Thought Leadership, Executive Leadership and Dealmaking/Growth. Downing was selected as one of 12 for the Executive Leadership, Individuals – RIAs category from hundreds of applicants.

“There is truly no one more deserving of this honor,” said Jim Hagerty, CEO of Bartlett. “Kelley guided the firm through the Great Recession, led Bartlett to an international partnership of independent, fiduciary wealth management firms, led the search and merger with a Chicago firm to become a \$6 billion multi-office firm, and most recently transitioned from her role as President & CEO to an Executive Chair position as a culmination of her succession planning for the firm.”

“A luminary is a person who is an inspiration or guiding light to others, and to so many at Bartlett and in our industry, Kelley is just that,” said Bartlett President Holly Mazzocca. “Kelley has been an incredible leader and champion for Bartlett and for women in financial services. She was the first woman to hold the role of President & CEO at Bartlett and has used her leadership to establish formal mentorship programs, develop an internal initiative to support the growth of Bartlett’s future leaders, and drive significant advances in technology, a paperless environment, and other forward-thinking initiatives that keep Bartlett at the forefront of change in the wealth management industry.”

According to ThinkAdvisor, members of the Class of 2021 LUMINARIES were selected by a diverse panel of judges from across the advice industry, as well as by the editorial team at ThinkAdvisor.

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.

Cautionary Note Concerning Forward-Looking Statements

This release contains certain forward-looking statements that reflect Bartlett's current views with respect to certain current and future events. These forward-looking statements are and will be, subject to many risks, uncertainties and factors relating to Bartlett's operations and business environment, including, without limitation, uncertainty surrounding the current COVID-19 pandemic, which may cause future events to be materially different from these forward-looking statements or anything implied therein. Any forward-looking statements in this release are based upon information available to Bartlett on the date of this release. Bartlett does not undertake to publicly update or revise its forward-looking statements even if experience or future changes make it clear that any statements expressed or implied therein will not be realized. Additional information on risk factors that could affect Bartlett's may be found in the filings with the Securities and Exchange Commission made by Focus Financial Partners, LLC of which Bartlett is a partner firm.