Bartlett
WEALTH MANAGEMENT

MEDIA KIT 2020

COMPANY FACT SHEET

About Bartlett Wealth Management

Bartlett Wealth Management (Bartlett) is a Midwestern wealth management firm that provides customized investment management and financial planning services to high net worth individuals and families, foundations, and businesses throughout the region and beyond. The firm's team of distinguished investment and planning professionals provides independent fiduciary counsel for its clients.

Bartlett's status as an independent Registered Investment Advisory firm holds the company to the highest possible standard of conduct for a professional investment advisor due to its fiduciary standard of conduct. The company manages more than $6.3 billion[1] in assets for clients across the Midwest while leveraging forward-thinking technology and cybersecurity initiatives.

The firm invests heavily in its team to position Bartlett for continued future growth, employing a mentorship program and encouraging gender and age diversity in the firm's leadership positions to cultivate next generation leadership. Bartlett's culture also emphasizes playing an active role in the community, encouraging leadership and team members to support local nonprofit organizations through serving on committees, boards and in other leadership positions, or volunteering.

Company History

Tracing our roots back to 1898, Bartlett has managed the investments of generations of clients through world wars, a stock market crash, the Great Depression, and recessions. It was one of the first firms to register with the Securities and Exchange Commission and became a Registered Investment Advisory firm shortly after the Investment Advisers Act of 1940 was signed.

In 2018, Bartlett joined Focus Financial Partners and rebranded itself as Bartlett Wealth Management, expanding the leadership team to 17 principals. The company has consistently grown throughout the years both organically by welcoming new clients and through strategic mergers and acquisitions. In 2019, Bartlett experienced a 57.9% increase in its assets under management and further expanded the firm's team through a strategic merging with Lodestar Investment Counsel in Chicago.

Industry Recognition

- Barron's Top 50 Registered Investment Advisory Firms, 2019
- Financial Times' FT 300, 2019
- Bloomberg's No. 2 Registered Investment Advisory Firm in the U.S., 2014

Areas of Expertise

- Financial Planning
- Investment Management
- Wealth Management
- Family Office Services

EXECUTIVE LEADERSHIP

KELLEY J. DOWNING

President & CEO,
Wealth Advisor, Principal

Kelley is the president and CEO of Bartlett Wealth Management, the firm's first female to serve in these positions.

Under her leadership, Bartlett has received numerous national accolades and she was instrumental in expanding the firm's service offerings – most notably to begin providing wealth management services complementing Bartlett's existing financial planning and investment services. She has played a key role in positioning the firm for future growth through her "mentoring up" initiative and investment in the firm's next generation of leadership – particularly mentoring and championing women in the profession.

Following a successful career trading commodities on Wall Street, Kelley led institutional investments at Fifth Third Bank before joining the Bartlett Wealth Management team in 1996. She holds a bachelor's degree from Miami University and a Master of Business Administration degree from the Thunderbird School of Global Management.

In addition to her work at Bartlett, Kelley serves on the board of the St. Vincent de Paul Charitable Pharmacy, the Cincinnati Shakespeare Company, and the Dan Beard Boy Scout Foundation. She also is a committee member of the Cincinnati Women's Executive Forum, the Cincinnati Regional Business Committee, and the Cincinnati Symphony Orchestra.

Industry Recognition

- Girl Scouts of Western Ohio Women of Distinction, 2020
- Cincinnati Business Courier Women Who Mean Business Award, 2019
- Venue and Lead Magazine C-Suite Award, 2016
- Cincinnati Business Courier C-Suite Award, 2015
- YWCA Career Women of Achievement, 2015
- Cincinnati Enquirer Women of the Year Award, 2015
- Five Star Wealth Manager, since 2012

Areas of Expertise

- SRI/ESG investing
- Succession planning
- Navigating challenging life transitions
- Investing for women
- Protecting seniors from f inancial fraud
- Financial wellbeing after divorce

KEY PRODUCTS & SERVICES

Financial Planning

Bartlett Wealth Management provides financial planning services to help clients develop a strategic plan to meet individual financial responsibilities and goals. Bartlett primarily provides guidance in the following areas avs part of its financial planning services: retirement planning, inheritance advice, stock options, planning and funding charitable contributions, and estate planning. The firm's financial planners also assist clients in planning for and navigating through challenging and unexpected life events that can have an impact on financial health, such as divorce, coping financially with an elderly parent, and the death of a spouse or life partner.

Investment Management

The firm's in-house research analysts provide investment management guidance, employing traditional investing strategies (such as equity management) as well as alternative investment strategies to help its clients build a more diversified and balanced portfolio designed to mitigate risk, while striving to deliver consistent long-term results.

Wealth Management

Bartlett's wealth management team designs and executes holistic plans customized to each individual's unique financial needs and goals, helping clients manage investments that have become too complex or time-consuming to manage on their own, and/or are navigating a major life event such as a divorce or death. Bartlett's approach leverages both its financial planning and investment management services to ensure that clients know where their money is invested, the performance of investments, and how the portfolio will achieve their financial goals.

Family Office Services

Studies show fewer than 30 percent of families successfully sustain wealth beyond the third generation. Successful families of multi-generational wealth are well-organized and planned. Bartlett compiles all family assets and liabilities into one clear and current picture of overall wealth, helping clients develop a family charter, mission, and vision to convey the purpose of a family's wealth based on their unique and changing needs. The firm also assists in developing a governance structure to cash management, recordkeeping, and risk-management strategies to encourage a well-organized approach to multi-generational wealth.

FOR MORE INFORMATION

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Learn More about Bartlett:

- Website: https://bartlett1898.com/
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