

NEWS

For Immediate Release

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Blue Chip Partners Wins Best Practices Award from InvestmentNews

Plus: Market outlook webinar announced and new CFP® credentials added to team accomplishments

FARMINGTON HILLS, MI (January 17, 2023) – [Blue Chip Partners \(“Blue Chip”\)](#), an award-winning, independent, fee-only Registered Investment Advisor and comprehensive wealth management firm located just outside of Detroit, was recently named a winner of [InvestmentNews’ 2022 Best Practices Award](#). This award recognizes advisory firms at the top of their peer group in terms of financial performance, demonstrating high growth, productivity, and profitability. Award winners were determined based on results from the annual *InvestmentNews* Adviser Benchmarking Study, which looks to the top-performing financial advisory firms in the nation for lessons on how to build a best-in-class practice.

“We are so excited to be recognized as one of *InvestmentNews’* Best Practices,” said Robert Steinberg, Founder and CEO of Blue Chip Partners. “We couldn’t have earned this without all of our amazing team members who work hard to serve our clients and make Blue Chip an award-winning firm.”

Across categories – from solo practices consisting of one advisor, through small ensembles with less than \$5 million in annual revenue, to super ensembles with more than \$10 million – the top quartile firms in performance this year outpaced their peers in growth, even while generating 29% more revenue, 59% higher profit margins, and 65% higher adviser productivity. The 2022 Best Practices list consists of 11 firms – two solo practices and three firms in each ensemble category – that were the highest achievers in these metrics. Blue Chip Partners was one of the three winners in the midsize ensembles category.

Click to see the full list of [InvestmentNews’ 2022 Best Practices](#) and to learn more about the awards.

MANAGING DIRECTOR DAN SEDER FEATURED ON INVESTMENTNEWS' GAMEDAY STAGE

InvestmentNews also recently featured Blue Chip Partners on their Gameday Stage at the 2022 Schwab IMPACT Conference, where Blue Chip's Managing Director [Dan Seder, CFA®, CMT, CFP®](#), joined host Gregg Greenberg on stage for a [video interview](#) on year-end strategies for company executives – a clientele that Seder and Blue Chip specialize in serving.

“Executives holding restricted stock should consider capturing losses if those shares are down,” said Seder. “They should also better understand the time-value of their stock options.”

Click to watch the full [InvestmentNews Gameday video interview](#).

BLUE CHIP PARTNERS TO PRESENT Q1 2023 MARKET OUTLOOK WEBINAR

On January 18th from 4-4:30pm ET, three of Blue Chip's senior-level team members will lead an educational webinar titled [Quarterly Edge Live](#), sharing Blue Chip's Q1 2023 Market Outlook.

Blue Chip's Director of Investments, [Daniel Dusina, CFA®](#), will be joined by Seder and [Matthew Mondoux, CFA®, CMT, CFP®](#), Senior Financial Advisor, for a discussion on topics to keep an eye on as 2023 gets underway, including fixed income vs. equity holdings, ongoing inflation and economic pressures, a possible recession, and more market insights. The team will also field audience questions.

The webinar will dive deeper into Dusina's Q1 2023 [Quarterly Edge Report](#), which included written commentary and videos focusing on Blue Chip's three main topics of the quarter:

- Are Bonds Back?
- Blue Chip Debt
- Taking Stock

Click to see the full [Q1 2023 Quarterly Edge Report](#). Journalists and the general public are invited to [register for the Quarterly Edge Live webinar](#).

FINANCIAL ADVISOR EMILY PRATER EARNS CFP® MARKS

In addition, Blue Chip announced that financial advisor [Emily Prater, CPA, CFP®](#) has earned the CERTIFIED FINANCIAL PLANNER™ marks of distinction and can now use the CFP® marks after her name. With this accomplishment came a promotion for Prater, who moved from Associate Advisor to Financial Advisor within the firm.

“We're so proud of Emily and the hard work she put in to achieve this success,” said Erin Goss, Chief Operating Officer at Blue Chip Partners. “Since joining our firm in 2021,

Emily has been an invaluable part of our team, and we're excited to witness her continued growth.”

In addition to two Associate Financial Advisors, there are now eight Financial Advisors on staff. Seven of them are CERTIFIED FINANCIAL PLANNER™ professionals.

Click to learn more about [the Blue Chip team](#).

ABOUT BLUE CHIP PARTNERS

Blue Chip Partners, LLC (Blue Chip) is a privately-owned, Registered Investment Advisory (RIA) firm headquartered in Farmington Hills, Michigan (a suburban area near Detroit). Blue Chip provides personalized wealth management and asset management services, serving as a fiduciary to over 700 client relationships with over \$1 Billion in assets under management. The advisors at Blue Chip Partners have extensive experience and credentials that provide the foundation for providing comprehensive wealth management and holistic advice to a select clientele. Blue Chip has seven CERTIFIED FINANCIAL PLANNER™ licensees (CFPs), four Chartered Financial Analyst (CFAs), three Certified Public Accountants (CPAs), three Chartered Market Technicians (CMTs), and two licensed attorneys (Michigan). To learn more, visit www.BlueChipPartners.com.

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