# NEWS

**For Immediate Release**

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# Bogart Wealth Earns Q1 2024 Recognition from Barron's, Forbes, Inc. Magazine, and Washington Business Journal

*Wealth management firm also launches new personal finance podcast as part of educational learning series*

**MCLEAN, VA (April 10, 2024) –** Bogart Wealth, an award-winning, independent wealth management and Registered Investment Advisory firm, was named to multiple lists of top financial advisors and fastest-growing companies in national and industry publications over the course of the first few months of 2024.

In *Barron's*, President and CEO James Bogart was named one of America's Top 1,200 Financial Advisors and a Best-In-State Wealth Advisor for 2024, ranking #5 overall in the state of Virginia and rising 6 spots from the 2023 rankings. This is the third consecutive year that he has been featured in the *Barron's* Top 1200 list.

In *Forbes*, Bogart was listed as a 2024 Best-In-State Wealth Advisor, ranking #4 overall in Northern Virginia and rising another spot from last year's rankings. This is his sixth consecutive year in *Forbes'* Best-In-State rankings. He has also been ranked in *Forbes'* list of Top Next-Gen Wealth Advisors since 2019, coming in at #1 in Virginia in the most recent 2023 rankings.

*Forbes* also included Senior Vice President and Financial Advisor Nell Cordick in their 2024 list of Top Women Wealth Advisors, ranking #12 in the state of Virginia. Cordick joined Bogart Wealth in 2020 and has worked in the wealth management industry for nearly 20 years, advising high-net-worth individuals and families on building, preserving, and managing their wealth. She seeks to understand clients' goals and needs while establishing a comprehensive financial plan and offering customized, innovative, and appropriate solutions.

In addition, James Bogart was recently included in *Washington Business Journal's* 40 Under 40 list for 2024, honoring the next generation of Greater DC-area business leaders, on the heels of being named a 2024 Top Financial Adviser and Fee-Only Financial Planner in Virginia by [*Washingtonian Magazine*]. Finally, the firm was named to the 2024 [Inc. Regionals Fastest-Growing Companies] list, coming in at #84 in the Mid-Atlantic region.

“It’s an honor to be recognized by these top-tier publications,” said Bogart. “We work hard for our clients every day, and all of this recognition reinforces the value we strive to bring to our clients’ lives. Also, I’d like to give a special shout out to the fantastic team at Bogart Wealth – without them, none of these achievements would be possible.”

**FORBES AND BARRON’S RANKINGS CRITERIA AND METHODOLOGY**

*Forbes'* rankings, developed by SHOOK Research, are one of the only advisor rankings with a focus on quality, including surveying and interviewing advisors in-person and virtually. Rankings are based on an algorithm of qualitative data collected through these surveys and interviews to evaluate best practices, level of service, investing models, industry experience, and compliance records, as well as quantitative data such as revenue produced and assets under management.

To learn more about the *Forbes* Best-In-State ranking methodology, click here. To see the full list of *Forbes*’ 2024 Best-In-State Wealth Advisors, click here.

To learn more about the *Forbes* Top Women Wealth Advisors ranking methodology, click here. To see the full list of *Forbes*’ 2024 Top Women Wealth Advisors, click here.

To learn more about the *Forbes* Top Next-Gen Wealth Advisors ranking methodology, click here.

The *Barron’s* rankings are based on data provided by around 6,000 of the nation's most productive advisors. Factors included in the rankings include assets under management, revenue produced for the firm, regulatory record, quality of practice, and philanthropic work. Investment performance isn't an explicit component because not all advisors have audited results and because performance figures often are influenced more by clients' risk tolerance than by an advisor's investment-picking abilities. The *Barron’s* rankings formula features three major categories of calculations: 1. Assets, 2. Revenue, and 3. Quality of practice.

To learn more about the *Barron’s* Top Advisor ranking methodology, click here. To see the full list of *Barron’s* Top 1,200 Financial Advisors rankings by state, click here.

**JAMES BOGART NAMED A 40 UNDER 40 HONOREE IN WASHINGTON BUSINESS JOURNAL**

In January, James Bogart was named to *Washington Business Journal’s* 40 Under 40 list for 2024. Honoring the next generation of Greater DC-area business leaders, Bogart was awarded due to the impressive growth of the firm under his leadership, the various top advisor lists he has been featured on, his thought leadership in industry and national publications, his work in the community and industry, and the launch of the firm’s professional growth and training program, Advisor Growth Track.

In order to be considered, nominees must live and work in the Washington DC area and are judged based on professional accomplishments, community leadership, awards, and milestones. To learn more about the selection criteria and to see the full list of honorees, please click here.

This honor from the *Washington Business Journal* came on the heels of another recognition from a prominent local publication – namely, *Washingtonian Magazine*, where James Bogart was named a 2024 Top Financial Adviser and Fee-Only Financial Planner in Virginia. To arrive at the names of Virginia's Top Financial Advisers, the Washingtonian distributed surveys to hundreds of people who work in the local financial industry and asked them whom they would trust with their own money, in addition to doing their own research and consulting industry experts and publications. The advisors who received the strongest recommendations were listed as a Top Financial Adviser.

To see the full list of Top Financial Advisers in *Washingtonian Magazine* and learn more about how they're chosen, please click here.

**BOGART WEALTH INCLUDED IN INC. REGIONALS LIST**

Bogart Wealth was also named to the 2024 Inc. Regionals Fastest-Growing Companies list – *Inc. Magazine's* annual ranking of America's fastest-growing private companies by region – coming in at #84 in the Mid-Atlantic region.

Bogart Wealth made the list thanks to their 124% 2-year growth (companies are ranked according to percentage revenue growth from 2020 to 2022). The firm has experienced rapid growth since 2020 and now manages over $2.5bn in client assets.

Bogart Wealth was also included in the Inc. 5000 list the past three years, *Inc. Magazine's* national ranking of America's fastest-growing private companies, coming in at #3,547 in the 2023 rankings.

To see Bogart Wealth's Inc. profile along with the full regional rankings, please click here. To learn more about the Inc. Regionals lists and the verification process, please click here. To learn more about the Inc. 5000 list and verification process, please click here.

**BOGART LAUNCHES EDUCATIONAL PERSONAL FINANCE PODCAST**

As a fiduciary, Bogart Wealth takes great pride and responsibility in being financial educators. This was the catalyst for launching a new, educational podcast called THE BOGART EFFECT: A Wealthy Wisdom Podcast, featuring founder James Bogart and his team of financial advisors and special guests having candid conversations about everything related to personal finance.

Each will share personal stories and experiences, with the goal of taking a fresh look at what saving and planning for the future really looks like. The program is also meant to provide insightful takeaways that listeners can apply to their own financial lives.

The podcast launched with three episodes:

- In "2024 Planning", host James Bogart and Financial Advisor Brian Windsor talk about how they prepare and plan for their financial future in the new year.
- In "How Roth IRAs Can Be Great", Bogart is joined by Financial Advisor Sydney Rutledge to talk about the benefits of Roth IRAs and why they think it can be a great choice for certain savers and investors.
- In "The Family Conversation", Bogart and Financial Advisor Morgan Veth discuss how they approach talking about money, investments, and retirement with their loved ones.

Audio episodes are available to listen to here, as well as on Apple, Spotify, and all major podcast platforms, while video versions of each episode are available to watch on YouTube.

## ABOUT BOGART WEALTH

Bogart Wealth is an independent, fee-only wealth management firm guiding corporate executives, professionals, and families on their paths to and throughout retirement. Led by President and CEO James Bogart, their mission is to help clients achieve financial peace of mind by preserving and maximizing intergenerational wealth. As a Registered Investment Advisor (RIA), Bogart Wealth is held to a fiduciary standard, which gives clients confidence in knowing that everything the firm does is always in their best interest. Clients of Bogart Wealth enjoy an extremely high level of service, and the firm's boutique size enables multiple advisors to become familiar with each client and their financial plan. At Bogart Wealth, everyone is a part of the team, and they have taken great care to build a collegial and cooperative culture, as well as a diverse set of skills, experience, qualifications, and credentials. The team works together to apply their combined experience, expertise, and knowledge to each client account. To learn more, visit www.BogartWealth.com.

## IMPORTANT DISCLOSURE INFORMATION

**Please Note: Limitations**. Neither rankings nor recognitions by unaffiliated rating services, publications, media, or other organizations, nor the achievement of any professional designation, certification, degree, or license, membership in any professional organization, or any amount of prior experience or success, should be construed by a client or prospective client as a guarantee that the client will experience a certain level of results if Bogart Wealth is engaged, or continues to be engaged, to provide investment advisory services. A fee was not paid by Bogart Wealth to receive the ranking. The ranking is based upon specific criteria and methodology (see ranking criteria/methodology). No ranking or recognition should be construed as an endorsement by any past or current client of Bogart Wealth.

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