NEWS

For Immediate Release

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Bogart Wealth Included in the 2022 InvestmentNews Best Places to Work for Financial Advisers Rankings

In addition, independent wealth management firm announces new hires and open positions

MCLEAN, VA (April 5, 2022) – Bogart Wealth, an independent, fee-only wealth management and Registered Investment Advisory firm, recently announced that they were listed in the InvestmentNews 2022 Best Places to Work for Financial Advisers rankings. Currently in its fifth year, the program recognizes financial advice businesses that create meaningful work experiences for all their professionals and value a commitment of excellence to both their employees and clients.

"I'm very proud of our team and our firm for receiving this recognition," said James Bogart, President and CEO of Bogart Wealth. "We pride ourselves in creating a fun and caring work environment, and we've taken great care in building a family-oriented, collegial, and collaborative team – so we're very happy to see that acknowledged with this ranking."

Each year, this program is conducted in partnership with employee survey firm Best Companies Group. Winners are selected from a two-part survey completed by employers and employees. Employers report their organization's workplace policies, practices, and demographics, and employees complete a survey designed to measure the employee experience. Scores from the employee survey represent three-quarters of the weight of the final rankings.

"The 75 firms presented here go beyond offering financial advisers attractive benefits and perks," said InvestmentNews. "They create workplaces that empower employees with the skills and confidence necessary to deliver the best possible investment and financial planning guidance to clients. In 2022, they're also taking steps to keep employees safe during the ongoing pandemic."

Here are the factors that Bogart Wealth believes helped them be included in the rankings:

- Core values include communication, commitment, teamwork, integrity, growth, and fiduciary
- Fun, exciting, caring, understanding, and inclusive work environment
- Family-oriented, collegial, and collaborative group of team players that are always willing to help each other so no one is overwhelmed
- Team members truly care about one another as individuals and the firm encourages personal connections
- High level of trust amongst team members
- Tasks get accomplished quickly and the firm is experiencing rapid growth
- Value open and clear communication, as well as access and transparency
- Executives vocalize their appreciation and gratitude on a daily basis and do weekly shoutouts to acknowledge hard work
- Bi-weekly "Thirsty Thursdays" with specialty coffee brought in
- Monthly catered lunches
- Holiday parties and other celebrations
- Annual 'Team Appreciation' days with gifts and catered lunch
- Generous benefits, including 401(k) with company match, paid time off, life insurance, health insurance, health spending account, dental insurance, vision insurance, professional development assistance, and employee referral program
- Professional development, career growth opportunities, and service recognition
- Multiple office locations, including McLean, Virginia, The Woodlands, Texas, and Houston, Texas
- New office space at the headquarters in McLean, VA – over 10,000 square feet in a modern building at Tysons Corner, open plan office with a collaborative environment, well-lit and uplifting space with great views, up-to-date kitchen with coffee and other refreshments, multiple conference rooms, a professional video/podcast room, and motivational wall art

To learn more about the InvestmentNews Best Places to Work for Financial Advisers rankings and to see the full list of companies included, please click here.

NEW TEAM MEMBERS AT BOGART WEALTH

Bogart Wealth has been rapidly growing and expanding over the last few years – in fact, the firm has more than doubled its assets under management organically since the start of the pandemic and now manages around $1.9 billion for a diverse clientele. As a result of this high demand for their special attention and fiduciary financial planning and investment management services, there has been a drastic need to grow the team at Bogart Wealth, and there have already been four new hires so far in 2022:

- Jung Seh, Financial Advisor
- Patrick Marcinko, Associate Financial Advisor

- Harrison McQuaig, Financial Planning Associate
- Alex Moir, Client Services Associate
- Victoria Holcom, Client Services Associate

"We are very excited to welcome these five professionals to the team at Bogart Wealth, all of whom bring their own unique talents and skills to our organization," said Michelle Dubay, Chief Operating Officer at Bogart Wealth. "However, our growth doesn't stop here – we are actively hiring and looking to fill open positions in our offices in McLean, Virginia and The Woodlands, Texas."

OPEN POSITIONS AT BOGART WEALTH

Bogart Wealth is currently looking for team players and hard workers that are willing to go above and beyond expectations to fill eight open positions in the McLean office and three open positions in The Woodlands office. Open positions include Financial Advisor, Director of Client Services, Advisory Manager, Associate Financial Advisor, Financial Planning Associate, Client Service Associate, and more.

To learn more about the open positions and careers at Bogart Wealth, please click here. To learn more about all of the employee benefits at Bogart Wealth, please click here.

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.

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