NEWS

For Immediate Release

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Bogart Wealth Launches Advisor Growth Track, a Training Program for Emerging Talent and Experienced Financial Advisors

Professional growth and learning program takes place in conjunction with employment at Bogart Wealth

MCLEAN, VA (March 1, 2023) – Bogart Wealth, an independent, fee-only wealth management and Registered Investment Advisory firm, today announced the launch of Advisor Growth Track, a professional growth and training program for both emerging talent and experienced financial advisors that takes place in conjunction with employment at Bogart Wealth.

"We are super excited to formally launch this program," said James Bogart, President and CEO of Bogart Wealth. "We've been training and developing our employees in the Bogart way for years, but we are officially launching Advisor Growth Track in order to help young and emerging professionals find their best fit by working a variety of roles within an established and rapidly growing wealth management firm, as well as experienced advisors create a glide path for the future."

FIND YOUR PLACE WITHIN ONE OF THE FASTEST-GROWING RIA FIRMS IN THE COUNTRY

Advisor Growth Track is suitable for motivated individuals new to the financial services industry looking to gain their footing, as well as experienced advisors looking to revitalize their practice and partner with a winning team. Bogart Wealth builds a personalized program for each individual so they can, as appropriate, "work all the stations" and find their groove within a proven and successful financial services firm.

For emerging talent, Bogart Wealth aims to share their expertise and specialized perspective within every department at the firm, helping candidates thrive and grow under the mentorship of one of the fastest-growing Registered Investment Advisory (RIA) firms in the country in a collaborative, family-oriented, high-achieving environment. Participants gain expertise in all aspects of holistic financial planning including retirement planning, investment management, estate and multigenerational planning, risk management, client services and communications, account management, operations, and more.

For established advisors looking to "tuck in" with a robust firm, Bogart Wealth creates a customized growth and succession plan that helps them monetize today while creating a greater glide path and continuity plan for the future. The program allows them to enhance their skills, learn the Bogart way, and grow together.

"You'll learn how to deliver a first-rate client experience – and be supported every step of the way – as we guide successful individuals and their families on their paths to and throughout retirement, while also helping them achieve financial peace of mind by preserving and maximizing intergenerational wealth," added Bogart.

To learn more about Advisor Growth Track, please click here. To apply for the program, please click here.

A CULTURE OF EXCELLENCE

Founded in 2016 and headquartered in McLean, Virginia with additional offices in Houston and The Woodlands, Texas, Bogart Wealth is one of the fastest-growing RIA firms in the country, as identified by *Inc. Magazine* (Inc. 5000), *Financial Advisor Magazine*, *SmartAsset*, *ThinkAdvisor*, *Citywire*, *Houston Business Journal*, and more. In addition, Bogart has been identified as a top financial advisor in *Forbes*, *Barron's, Washington Business Journal,* and more.

Bogart Wealth was also recognized by *InvestmentNews* in their 2022 Best Places to Work for Financial Advisors list, which features financial advice businesses that create meaningful work experiences for their professionals and value a commitment to excellence for both their employees and clients.

"We balance a culture of excellence with a collaborative, family-oriented environment where our employees can feel empowered to do their best work for our valued clients," said Bogart. "We've also cracked the code on marketing and attracting the right types of clients. In fact, we have such a robust pipeline of new business now that we need and want to add talent and energy to our team as soon as possible."

To learn more about Bogart Wealth's team culture and core values, please click here.

OPEN POSITIONS AT BOGART WEALTH

Bogart Wealth continues to experience rapid growth in all facets of the firm and has more than tripled assets under management organically in the past three years (currently managing around $2.4B AUM). They currently have open positions in financial advisory, financial planning, portfolio management, compliance, marketing, client services, 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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