

NEWS

For Immediate Release



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Bogart Wealth Listed in SmartAsset and Financial Advisor Magazine 2022 RIA Rankings, Surpasses \$2B in AUM

*In addition, independent wealth management firm
announces 6 new hires and multiple open positions*

MCLEAN, VA (July 27, 2022) – [Bogart Wealth](#), an independent, fee-only wealth management and Registered Investment Advisory firm, was recently listed in [Financial Advisor Magazine’s 2022 RIA Survey and Ranking](#), listing the top 534 Registered Investment Advisory firms in the U.S. by assets under management (AUM). Bogart Wealth ranked #241 in the list of largest RIAs, with year-end 2021 assets totaling over \$1.9B. Bogart Wealth also ranked #34 in their list of the Top 50 Fastest Growing RIA Firms, with a 46.76% growth in assets from 2020 to 2021 and a 22.44% growth in assets per client. Bogart Wealth has been included in the Financial Advisor RIA rankings every year since 2019.

“It’s an honor to yet again be featured in Financial Advisor Magazine’s RIA rankings,” said James Bogart, President and CEO of Bogart Wealth. “We are extremely pleased to also be featured in the list of fastest growing firms, as we’re very proud of our growth in the past year and since the start of the pandemic.”

To see Financial Advisor Magazine’s full RIA rankings, [please click here](#). To see their full list of the fastest growing firms, [please click here](#).

RANKED BY SMARTASSET AS SECOND FASTEST-GROWING FIRM

In addition, Bogart Wealth was included in SmartAsset’s list of the [Top 50 Fastest-Growing Financial Advisor Firms](#), ranking #2 in their 2022 list. The report notes that Bogart has experienced 3-year growth of 157% and 1-year growth of 47% in AUM, as well as 3-year growth of 135% and 1-year growth of 38% in client accounts.

To identify the fastest-growing financial advisor firms in the U.S., SmartAsset eliminated RIAs that took part in mergers or acquisitions during the time period considered, comparing a total of 729 RIAs across four metrics: one- and three-year percentage change in number of client accounts and one- and three-year percentage change in AUM.

BOGART WEALTH SURPASSES \$2B IN AUM

Bogart Wealth recently announced that they surpassed \$2B in AUM, sitting at just above \$2B as of July 19, 2022 – despite all of the recent market volatility. Bogart Wealth has more than doubled its AUM organically since the start of the pandemic and continues to add new clients and households as the firm experiences rapid growth in all facets of the business (1,131 clients as of July 2022).

“I’m very proud to announce that we are now managing over \$2 billion for our clients,” said Bogart. “It was only a matter of time, but it’s a huge milestone for our firm. It’s also a testament to our team, who pride themselves on serving our clients at the highest level. A big thank you to our whole team, as well the many clients who have referred us to friends, family, and colleagues.”

NEW TEAM MEMBERS AT BOGART WEALTH

In order to properly serve all their new clients, Bogart Wealth continues to hire new employees and add to their team. In Q2 2022, Bogart Wealth hired six new team members:

- Misty Garza, CFP®, MBA, Vice President, Financial Advisor
- Brian Windsor, CFP®, Vice President, Financial Advisor
- Morgan Veth, CFP®, Vice President, Financial Advisor
- Jung Seh, Financial Advisor
- Adam Platt, Junior Portfolio Analyst
- Chaz Billak, Client Service Associate

“We are very excited to welcome these six 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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