NEWS

For Immediate Release

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Bogart Wealth Named to Top Financial Advisor and Fastest-Growing Companies Lists in Barron’s, Forbes, USA Today, and Inc.

Wealth management firm also releases educational guide to SECURE Act 2.0 and adds new Director of Advisory to team

MCLEAN, VA (June 20, 2023) – 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 past few months.

In *Barron’s*, CEO James Bogart was named one of America’s Top 1,200 Financial Advisors and a Best-In-State Wealth Advisor for 2023, ranking #11 overall in the state of Virginia. In *Forbes*, Bogart was listed as a 2023 Best-In-State Wealth Advisor, ranking #5 overall in the state of Virginia.

In addition, the firm was named one of *USA Today’s* Best Financial Advisory Firms of 2023 and was named to the 2023 Inc. Regionals Fastest-Growing Companies list, coming in at #105 in the Mid-Atlantic region. Finally, Chief Investment Officer Aleksandr Spencer was named one of the Top Black Industry Leaders of 2023 by *Wealth Solutions Report* in their Pathfinder Awards for Black History Month, being named CIO of the Year.

“We are absolutely thrilled to be included in all of these rankings and earn these awards from such prestigious media outlets,” said James Bogart, President and CEO of Bogart Wealth. “We’ve been experiencing rapid growth and achieving much recognition this year, and I’m so proud of our team. Without them, these honors wouldn’t 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*' 2023 Best-In-State Wealth Advisors rankings, 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.

BOGART WEALTH NAMED TOP ADVISORY FIRM BY USA TODAY

Bogart Wealth was recently named one of *USA Today*'s Best Financial Advisory Firms for 2023, placing on a list of the top 500 RIA firms in the country based on AUM growth and recommendations from clients and peers.

While the 500 included firms were not ranked in any particular order, the report notes: "There were more than 32,000 RIA firms in the U.S. at the end of 2021, including about 14,800 that were registered with the Securities and Exchange Commission and managed more than 99% of total RIA assets of $128.4 trillion. The list by Statista for *USA Today* has culled that daunting universe of RIAs to a top 500 firms based on the growth of their assets under management over the short and long term, and recommendations from clients and peers."

To learn more about *USA Today*'s and Statista's methodology for inclusion, please click here. To see the full list of *USA Today*'s Best Financial Advisory Firms, please click here.

BOGART WEALTH INCLUDED INC. REGIONALS LIST

Bogart Wealth was also named to the 2023 Inc. Regionals Fastest-Growing Companies list, *Inc. Magazine's* annual ranking of America's fastest-growing private companies by region. coming in at #105 in the Mid-Atlantic region.

Bogart Wealth made the list thanks to their 98% 2-year growth throughout 2021 and 2022. The firm continues to experience rapid growth, recently surpassing $2.5 billion in assets under management after passing the $2B mark less than a year ago.

Bogart Wealth was included in the Inc. 5000 list the past two years, *Inc. Magazine's* national ranking of America's fastest-growing private companies, coming in at #4,192 in the 2022 rankings and #4,971 in the 2021 list.

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.

CIO ALEKSANDR SPENCER HONORED IN WEALTH SOLUTIONS REPORT

Bogart Wealth Chief Investment Officer Aleksandr Spencer was named CIO of the Year, as well as one of the Top Black Industry Leaders of 2023, by *Wealth Solutions Report* in their Pathfinder Awards for Black History Month. The recognition highlighted Spencer's role in Bogart Wealth's growth and success, including overseeing and managing the firm's in-house money management, as well as his career and background.

Wealth Solutions Report is a leading free media source for wealth management-related content featuring experts from the financial services industry. Their Pathfinder Awards series celebrates diversity and gives the voices of underrepresented communities a platform by awarding top wealth management executives from underrepresented backgrounds, coinciding with Black History Month, Women's History Month, Asian American and Pacific Islander Heritage Month, and National Hispanic Heritage Month.

Previously, Bogart Wealth was recognized in *Wealth Solutions Report* as a winner of the 'Fee-Based RIA of the Year' award in their 2022 Wealth Exemplar Awards,

To read Aleksandr's full award feature in *Wealth Solutions Report*, please click here.

JASON GULOSH ADDED TO TEAM AS DIRECTOR OF ADVISORY

Bogart Wealth recently introduced Jason Gulosh, CFP® to the team as Director of Advisory where he leads the firm's team of Financial Advisors and oversees the Advisory department. He brings over 20 years of industry experience to the firm. In addition to his management experience, he has extensive experience building, maintaining, and implementing financial plans for clients.

Gulosh is a graduate of William & Mary in Williamsburg, VA with a B.A. in Economics. He is a registered representative and also a CERTIFIED FINANCIAL PLANNER (CFP®). To learn more about Gulosh, click here.

BOGART WEALTH RELEASES EDUCATIONAL GUIDE TO SECURE ACT 2.0

To address the second SECURE Act, which Congress passed at the end of 2022, and to provide the most helpful context and advice, Bogart Wealth recently released a comprehensive guide to SECURE Act 2.0.

Within the educational resource, experts at the firm break SECURE 2.0 down by topic and dive into different areas of financial planning, making it easy to understand why these changes matter and how they may affect pre-retirees and other investors. Topics include changes to required minimum distributions, catch-up contributions, updates to saving for college and 529s, new employer benefits (including student loan repayment, Roth contributions, and new incentives to save), new incentives to give, and more.

To download Bogart Wealth's full guide to SECURE Act 2.0, please click here. To watch an educational webinar on SECURE 2.0, covering retirement planning opportunities and challenges, 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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