NEWS

For Immediate Release

Media Contact:
Jonny Swift
Impact Communications, Inc.
913-649-5009
JonnySwift@ImpactCommunications.org

Bogart Wealth Named to Top Financial Advisor and Fastest-Growing Companies Lists in Forbes, Washington Business Journal, and Inc.

CEO James Bogart named #1 overall Next-Gen Wealth Advisor in Virginia and #34 nationally in Forbes rankings

MCLEAN, VA (September 15, 2022) – Bogart Wealth, an independent, fee-only wealth management and Registered Investment Advisory firm, was recently named to multiple lists of top financial advisors and fastest-growing companies in national and industry publications. CEO James Bogart was included in *Forbes'* list of Top Next-Gen Wealth Advisors, coming in at first overall in Virginia and #34 overall nationally. In addition, Bogart Wealth ranked #4,192 overall in the 2022 Inc. 5000, *Inc. Magazine's* annual ranking of America's fastest-growing private companies, and landed eighth overall in the *Washington Business Journal's* rankings of the largest wealth management firms in greater Washington D.C.

"We are ecstatic to be included in all of these rankings from such prestigious media outlets," said James Bogart, President and CEO of Bogart Wealth. "We're experiencing rapid growth lately and I'm so proud of our team. Without them, these rankings wouldn't be possible."

FORBES RANKINGS REPRESENT TRUE ROLE MODELS OF THE INDUSTRY

The *Forbes* Next-Gen Wealth Advisors rankings, developed by SHOOK Research, is based on an algorithm of qualitative criterion – mostly gained through telephone and in-person due diligence interviews – and quantitative data. Those advisors that are considered have a minimum of four years' experience, and the algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass the highest standards of best practices. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings. To learn more about *Forbes'* Next-Gen Wealth Advisors ranking methodology, please click here.

"Our rankings represent the true role models of the industry," said R.J. Shook, Founder and President of Shook Research. "We believe our Top Next-Gen Wealth Advisor rankings are an early peek of our future Top Wealth Advisor rankings – say, 10 or more years from now."

In fact, James Bogart has already been included in *Forbes'* Top Wealth Advisor rankings in recent years. In *Forbes'* 2022 Best-In-State Wealth Advisor rankings, Bogart ranked #12 overall in the state of Virginia. This is his fifth year in a row being listed as a Top Advisor in *Forbes*, being named a Top Next-Gen Wealth Advisor since 2018 and a Best-In-State Wealth Advisor since 2019.

To see *Forbes'* full list of Top Next-Gen Wealth Advisors, please click here. To see James Bogart's *Forbes* Top Advisor profile, including rankings in other Top Advisor lists, please click here.

BOGART WEALTH INCLUDED IN SECOND CONSECUTIVE INC. 5000

For the second consecutive year, Bogart Wealth was included in the Inc. 5000 list, *Inc. Magazine's* annual ranking of America's fastest-growing private companies. In the 2022 rankings, the firm was ranked #4,192, climbing nearly 800 spots from their ranking of #4,971 in the 2021 list.

Bogart Wealth made the list thanks to their 111% 3-year growth from 2019-2021. The firm continues to experience rapid growth in all facets of the company, recently surpassing $2 billion in assets under management and nearly tripling AUM since the start of the pandemic. Bogart Wealth has also been growing and expanding their team during this time, hiring 16 new employees since the start of the pandemic, including 6 in Q2 2022 alone.

To see Bogart Wealth's Inc. 5000 profile along with the full 2022 rankings, please click here. To learn more about the Inc. 5000 list and the verification process, please click here.

BOGART WEALTH INCLUDED IN WASHINGTON BUSINESS JOURNAL'S LIST OF LARGEST WEALTH MANAGEMENT FIRMS

In addition, Bogart Wealth was included in the *Washington Business Journal's* list of the Largest Wealth Management Firms in Greater Washington D.C., coming in at #8 in the 2022 rankings. Bogart Wealth is headquartered in McLean, Virginia, just outside of Washington D.C., and D.C. area wealth management firms were ranked by 'Metro-area financial planners'. Based on statistics from 2021, Bogart Wealth had 8 metro-area financial planners and 21 metro-area employees. As of September 2022, the firm has 11 Certified Financial Planners and 28 total employees.

As the firm continues to grow, they are actively hiring financial planners and support staff. Open positions in the McLean, Virginia office include Compliance Associate, Advisory Director, Financial Advisor, Associate Financial Advisor, Financial Planning Associate, and more, and open positions in The Woodlands, Texas office include Advisory Director, Financial Advisor, Associate Financial Advisor, 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.

To see the full rankings of the Largest Wealth Management Firms in Greater Washington D.C. in the *Washington Business Journal*, 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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