NEWS

For Immediate Release

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

BOGART WEALTH

Bogart Wealth Ranked #41 in Forbes' 2022 List of America's Top RIA Firms

Comprehensive wealth management firm also named to the Houston Business Journal's 2022 Fast 100 Rankings

MCLEAN, VA (November 22, 2022) – Bogart Wealth, an independent, fee-only wealth management and Registered Investment Advisory firm, was recently listed in *Forbes*' list of America's Top RIA Firms, ranking #41 overall in the 2022 list and second overall in the state of Virginia. The inaugural Top RIA list included 100 advisory firms around the country and was compiled by *Forbes* and SHOOK Research.

"We are so excited to be included in *Forbes*' inaugural list of Top RIA firms," said James Bogart, President and CEO of Bogart Wealth. "On the heels of much recognition for our firm throughout the year, this is perhaps the biggest honor."

FORBES RANKINGS REPRESENT RIA FIRMS OF THE HIGHEST QUALITY

The inaugural *Forbes* Top RIA list includes 100 advisory firms with cumulative assets of $730 billion. All are helmed by professionals who have decades of experience, not to mention proven track records of seeing clients through market turmoil and preserving their wealth.

The *Forbes* ranking of America's Top RIA Firms, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone, virtual and in-person due diligence interviews, and quantitative data. The algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices and approach to working with clients. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. SHOOK is completely independent and objective, and neither *Forbes* nor SHOOK receive compensation in exchange for rankings. To learn more about *Forbes'* Top RIA ranking methodology, please click here.

“When we meet with these independent firms, we take a close look at leadership and the senior principals since they tend to dictate every client’s experience,” said R.J. Shook, Founder and President of SHOOK Research. “When we meet with a firm or an advisor for a due diligence meeting, we are always thinking to ourselves, "Would we recommend this firm (or individual) to a friend or family member?" Quality is always first – if we're going to include a firm (or advisor) in our rankings, we have to make sure everyone is of the highest quality.”

Bogart Wealth President and CEO James Bogart has been included in other *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, and in the 2022 Best-In-State Next-Gen Wealth Advisors rankings, Bogart ranked #34 overall and #1 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 America’s Top RIA Firms, 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 HOUSTON BUSINESS JOURNAL’S 2022 FAST 100 LIST

In addition, Bogart Wealth was recently included in the *Houston Business Journal’s* 2022 Fast 100 list, coming in at #48 in the 2022 rankings. Bogart Wealth is headquartered in McLean, Virginia but has additional offices in Houston and The Woodlands, Texas.

The Fast 100 list ranks the fastest-growing companies in the Houston area by two-year revenue growth from 2019 through 2021. Bogart Wealth revenue growth during this time was 97.97%, growing from $4.76 million at the end of 2019 to $9.42 million at the end of 2021. The firm also more than doubled assets under management during that time.

As Bogart Wealth continues to experience rapid growth in all facets of the firm, they are actively hiring financial planners and support staff. Open positions in the McLean, Virginia office include Compliance Associate, Advisory Manager, Financial Advisor, Associate Financial Advisor, Financial Planning Associate, and more, and open positions in The Woodlands, Texas office include Advisory Manager, 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 2022 Fast 100 list in the *Houston 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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