# NEWS

**For Immediate Release**

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

*CEO James Bogart named top Next-Gen Wealth Advisor in Virginia, plus named a finalist in ThinkAdvisor Luminaries Awards*

**MCLEAN, VA (August 29, 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 couple months.

CEO James Bogart was named *Forbes*' top Next-Gen Wealth Advisor in Virginia in the 2023 list of Best-In-State Next-Gen Wealth Advisors, coming in at #33 overall in the 2023 list of America's Top Next-Gen Wealth Advisors. Bogart was also named a 2023 *ThinkAdvisor* Luminaries finalist for Executive Leadership among RIA firms.

In addition, Bogart Wealth ranked #3,547 overall in the 2023 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. The firm also was listed in *Financial Advisor Magazine's* 2023 RIA Rankings, ranking #192 on the nationwide list of largest RIAs, as well as #25 in the publication's list of the Fastest Growing RIA Firms.

"We are so excited to be included in all of these rankings and earn these awards from such prominent media outlets," said James Bogart, President and CEO of Bogart Wealth. "Our firm has been experiencing much growth and success the past few years, and I'm so proud of our team. Without them, these recognitions 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."

In fact, James Bogart has already been included in *Forbes'* Top Wealth Advisor rankings in recent years. In *Forbes'* 2023 Best-In-State Wealth Advisor rankings, Bogart ranked #5 overall in the state of Virginia. This is his sixth 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 RANKED IN INC. 5000 FOR THIRD CONSECUTIVE YEAR**

For the third 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 2023 rankings, the firm was ranked #3,547, climbing over 600 spots from their ranking of #4,192 in the 2022 list.

Bogart Wealth made the list thanks to their 139% 3-year revenue growth from 2020-2022. The firm continues to experience rapid growth in all facets of the company and has more than doubled assets under management in the past three years. Bogart Wealth has also been growing and expanding their team, hiring 20 new employees during this time.

To see Bogart Wealth's Inc. 5000 profile along with the full 2023 rankings, please click here. To learn more about the methodology and verification process for the Inc. 5000 list, please click here.

**BOGART WEALTH NAMED TOP ADVISORY FIRM BY FINANCIAL ADVISOR MAGAZINE**

Bogart Wealth was recently listed in *Financial Advisor Magazine's* 2023 RIA Survey and Ranking, listing the top 521 Registered Investment Advisory firms in the U.S. by assets under management (AUM). Bogart Wealth ranked #192 in the list of largest RIAs (up 50 spots from the 2022 rankings), with year-end 2022 assets totaling nearly $2.3B. Bogart Wealth also ranked #25 in their list of the Top 50 Fastest Growing RIA Firms (up 9 spots from last year), with 18.55% growth in assets from 2021 to 2022. Bogart Wealth has been included in the *Financial Advisor* RIA rankings every year since 2019.

Rankings are compiled by AUM, and discretionary and nondiscretionary AUM are sourced from the firms' Form ADVs. To see *Financial Advisor Magazine's* full RIA rankings, as well as the full list of the fastest growing firms, please click here.

**CEO JAMES BOGART NAMED FINALIST IN THINKADVISOR LUMINARIES AWARDS**

In the 2023 *ThinkAdvisor* Luminaries Awards, James Bogart was named a finalist for Executive Leadership among RIA firms, thanks to the tremendous growth and success that Bogart Wealth has experienced in 2022 and 2023, in addition to launching Advisor Growth Track.

The Luminaries shine a spotlight on individuals and firms that are taking the most creative and boldest steps to push the investment advisory industry forward, while having the biggest impact. All finalists and winners are selected by a distinguished and diverse panel of judges from across the financial advice industry, as well as by the *ThinkAdvisor* editorial team. The 2023 Luminaries program will culminate at the 3rd Annual *ThinkAdvisor* Luminaries Awards Dinner held in New York City on November 28th.

To see the full list of finalists and to learn more about the 2023 *ThinkAdvisor* Luminaries, as well as the Awards Dinner, please click here.

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

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 2023 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 2022, Bogart Wealth had 8 metro-area financial planners and 25 metro-area employees. As of August 2023, the firm has 15 Certified Financial Planners and 32 total employees on staff.

As the firm continues to grow, they are actively hiring financial advisors and support staff. Open positions in the McLean, Virginia office include Financial Planner, Financial Advisor, and Marketing Manager, and open positions in The Woodlands, Texas office include Financial Advisor and Associate Financial Advisor.

Both locations are also hiring for the firm's Advisor Growth Track program, a professional growth and training program for both emerging talent and experienced financial advisors that takes place in conjunction with employment at Bogart Wealth, where employees work all the stations and gain expertise in all aspects of holistic financial planning. 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. Data for this list was collected from the companies and compiled by full time researchers in *The Business Journals* newsrooms, and information is generally gathered through direct outreach with the businesses. For more information, please click here.

**BOGART WEALTH INTRODUCES NEW TEAM MEMBERS**

Bogart Wealth also recently announced the additions of four new team members:

Suzanne Kellogg, IACCP®, Compliance Officer, assists the firm in meeting its regulatory obligations. She brings 19 years of industry experience to Bogart Wealth, with 15 years focused on investment advisory compliance programs.

Brendon Dashiell, CFA®, Senior Portfolio Analyst, has over 9 years of experience in various investment management related roles. Prior to joining Bogart Wealth, Brendon worked as a Fixed Income Trader and Assistant Portfolio Manager at an institutional investment management firm and as an Investment Consultant specializing in portfolio construction at Wells Fargo.

Luke Leonard and Nate Vandemeulebroecke are both participating in the Advisor Growth Track program and working as Client Service Associates after graduating from the Financial Planning program at Virginia Tech.

## 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.

## IMPORTANT DISCLOSURE INFORMATION



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