NEWS

For Immediate Release

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James Bogart Named a Top Financial Advisor in Barron's and Forbes Annual Rankings

CEO of independent wealth management firm, Bogart Wealth, ranks as #12 wealth advisor in Virginia on both lists

MCLEAN, VA (April 19, 2022) – James Bogart, CEO and President of Bogart Wealth, an independent, fee-only wealth management and Registered Investment Advisory firm, was recently named a Top Financial Advisor in annual lists released by both *Barron's* and *Forbes*.

In *Barron's*, Bogart was named one of America's 2022 Top 1,200 Financial Advisors and a Best-In-State Wealth Advisor, ranking #12 overall in the state of Virginia. In *Forbes*, Bogart was listed as a Forbes Top Advisor and named a 2022 Best-In-State Wealth Advisor, also ranking #12 overall in the state of Virginia.

"I'm honored and humbled to be named a Top Advisor in both of these prestigious publications," said James Bogart, President and CEO of Bogart Wealth. "However, I really view these awards as recognition for our firm as a whole. Any success I have achieved individually is the direct result of the collective effort of our entire team. I'm proud that our team works together every day to deliver a first-rate client experience, guiding corporate executives, professionals, and families on their paths to and throughout retirement while also helping them achieve financial peace of mind by preserving and maximizing intergenerational wealth."

While this is Bogart's first time making the *Barron's* Top Advisor list, this is his fifth year in a row being listed as a Top Advisor in *Forbes*. From 2019 through 2021, he was named to *Forbes'* Best-In-State and Top Next-Gen Wealth Advisors lists, and in 2018, he was named a Top Next-Gen Wealth Advisor.

To see the full list of *Forbes*' 2022 Best-In-State Wealth Advisors rankings, please click here.

To see the full list of *Barron's* Top 1,200 Financial Advisors rankings by state, please click here.

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.

SHOOK Research prides itself on recognizing the most outstanding financial advisors in the business and creating rankings of role models – advisors that are leading the way in offering best practices and providing a high-quality experience for clients. Unlike other advisor rankings, SHOOK is not a "robo-ranker" and is completely independent and objective – they do not receive compensation from financial advisors, their firms, or the media in exchange for rankings. They believe that production and asset numbers don't tell the whole story and that a focus on both qualitative and quantitative factors is imperative. To learn more about the *Forbes'* Best-In-State ranking methodology, please 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.

Advisors who wish to be ranked fill out a 102-question survey about their practice. *Barron's* verifies that data with the advisors' firms and with regulatory databases and then applies their rankings formula to the data to generate a ranking. The 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, please click here.

ABOUT JAMES BOGART

A seasoned wealth advisor, James Bogart, CFP®, ChFC, President and CEO of Bogart Wealth, takes personal pride in assisting executives, entrepreneurs, and professionals pursue their dreams through highly customized financial planning strategies. As Principal, he focuses on maintaining the highest level of customer service and attention to detail possible, and on seeking to deliver the most effective technology, reporting tools, and analysis to every client.

An innovative visionary with seemingly endless energy, James surrounds himself with people who complement his skills, and he consistently promotes a collaborative environment. He leads by example, always exemplifying Bogart Wealth's core values. James sets a high bar for himself and his employees and encourages everyone to acquire designations that will help them catapult their career and better serve clients.

During the pandemic, James has led Bogart Wealth's company growth from $700 million AUM to $1.9 billion – all in organic growth. As a result of this high demand for their special attention and fiduciary financial planning and investment management services, there has been a drastic need to grow the team at Bogart Wealth, and there have already been four new hires so far in 2022 and 15 new hires in the last 18 months. In addition, Bogart Wealth's retention rate during the last 18 months has been 99.3%.

In early 2022, James spoke to students at Virginia Tech on how to succeed in the financial services industry, and he has been heavily involved in Virginia Tech's Financial Planning program.

In addition to *Barron's* and *Forbes,* he has been recognized as a top advisor in *Financial Advisor Magazine, Financial Times, Houston Business Journal, Washington Business Journal,* and *Virginia Business Magazine.*

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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