NEWS

For Immediate Release

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Principle Wealth Partners Named to Forbes' List of Top RIA Firms 2022

Independent financial planning and investment advisory firm ranked top in CT and #43 in the nation

MADISON, CONN (December 13, 2022) – Principle Wealth Partners (PWP) has been named one of the Top 100 RIA Firms in the nation. The inaugural Forbes/Shook Top RIA list, which was recently released, names 100 advisory firms with cumulative assets of $730 billion. All are helmed by professionals with decades of experience, proven track records of seeing clients through market turmoil, and preserving wealth. In Forbes' first-ever list of the Top 100 RIA firms in the United States, PWP was top-ranked in the State of Connecticut and #43 in the nation.

The Forbes ranking of America's Top RIA Firms, developed by SHOOK® Research, is based on an algorithm of qualitative criteria, which includes telephone, virtual and in-person due diligence interviews and quantitative data. The algorithm weighs factors like revenue trends, assets under management, compliance records and industry experience, as well as key indicators of best practices and each firm's approach to working with clients.

HELPING CLIENTS LIVE A BETTER LIFE

"This recognition is due to the efforts of the entire Principle team and their dedication to our firm's mission, improving the lives of our clients," said Robert S. Paolucci, CFP®, Founder and CEO. "We are dedicated to working with those who need help, want help, and are willing to delegate financial decisions to our team of professionals. We care deeply for our clients and are committed to helping them achieve their desired outcomes."

OTHER FIRM ACCOLADES

PWP has also been named to the Financial Advisor Magazine: RIA Survey & Ranking 2022 in the category of firms with $1.0 billion or more in assets under management. These rankings are based on an annual survey of information submitted by independent registered investment advisors (RIAs). The ranking methodology includes 2021 year-end discretionary and non-discretionary assets under management, year-over-year percentage growth in assets, and percentage growth in assets per client.

PWP was also selected as "the #1 grower" for the state of Connecticut in CityWire's 2022 list of 50 Growers Across America. This list focuses on planning-centric RIAs that are making the most headway in their own markets. In order to select the top RIA firm from each state, CityWire factored in growth across three categories: percentage growth in assets under management (AUM), monetary growth in AUM, and percentage growth in employees, combining these into a single numeric measure of growth in order to generate their list.

Robert S. Paolucci, CFP®, has also been named to the Forbes/Shook list of Best-in-State advisors for Connecticut, marking the fourth consecutive year that Paolucci has been awarded this honor. Forbes' rankings recognize the top financial advisors in the country, organized by state. The Forbes/Shook Best-In-State Wealth Advisors rankings are developed by SHOOK Research and based on comprehensive, in-depth qualitative and quantitative data. This includes telephone, virtual and in-person interviews, considering revenue trends, assets under management, compliance and experience.

In addition, Paolucci was named to Barron's 2022 list of the Top 1200 Financial Advisors for the second consecutive year. Barron's rankings recognize the top financial advisors in the country, organized by state. To be considered for this award, advisors must fill out a comprehensive survey on their practice, which is then verified and used to generate a ranking, considering assets, revenue, quality of practice and a variety of other quantitative and qualitative factors.

ABOUT PRINCIPLE WEALTH PARTNERS

Principle Wealth Partners (PWP) is an independently owned and operated SEC registered investment advisor with over $2 billion in assets under management, as of 12/31/21. This boutique investment firm of 23 team members has offices in Madison, Westport, and Old Saybrook, Connecticut. PWP provides comprehensive wealth management and customized financial planning services to entrepreneurs, executives, families, and businesses. With a professional philosophy rooted in behavioral finance, PWP commits to learning each client's goals and objectives, counseling them on important financial/life decisions, and tailoring solutions to meet their needs. The firm adheres to fiduciary standards, putting the client's best interests first and foremost before any other business objectives. Clients appreciate knowing where they stand as they work to achieve their financial goals, where they can afford to spend and enjoy the fruits of their labors, and how to create a tax-efficient, purpose-driven legacy. Learn more at www.PrincipleWealthPartners.com.

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