

NEWS

For immediate release

Media Contact:

Dori Thomas

Impact Communications, Inc.

913-649-5009

DoriThomas@ImpactCommunications.org



Quorum Private Wealth Named “Partner Firm of the Year” and Listed on *Forbes* America’s Top RIA Firms and Wealth Advisor Best-In-State Rankings

Plus, volunteer work in community results in donation to Financial Women of San Francisco

DANVILLE, CA [November 14, 2023] – [Quorum Private Wealth](#) (Quorum), a wealth management firm and independent advisor representative partner of [Sanctuary Wealth, LLC \(Sanctuary\)](#), an SEC Registered Investment Advisor (RIA), today announced their recent sweep of awards and naming to multiple lists of top financial advisors and fast-growing companies in national and industry publications. [Mike Barry, CPFA, C\(k\)P®, CIMA®, Kelly Milligan, CPWA®, CRPC®, C\(k\)P®, CPFA, Sue English Mazzetti, CPFA, CRPC®, and Melissa Yue, CFP®,](#) founded Quorum in 2021. The experienced and highly collaborative group of partners have made great strides in the few short years they have been an independent firm.

KUDOS FROM SANCTUARY WEALTH

Named **Partner Firm of the Year** at Sanctuary Wealth’s OASIS 2023, the RIA’s annual national conference, Quorum was recognized by their peers for the culture they have created in their California and New York offices. Sanctuary leadership, along with their colleagues across the country, cited the team’s willingness to give back.

“This is quite an accomplishment given that Quorum is one of 83 Sanctuary partner firms,” said Milligan. “We could not have achieved this without the trust and confidence of our existing clients who thankfully followed us to our new firm. We are also very grateful for the many new clients who have joined us since our opening. Sanctuary was a great partner throughout the transition and continues to be a critical component of our success.”

Additionally, Mazzetti was recognized for her commitment to giving back to her community. She won the **Sanctuary Cares Award** for her volunteer work as the 2024 Incoming President of [Financial Women of San Francisco \(FWSF\)](#), and, subsequently, FWSF received a \$10,000 donation from Sanctuary. Criteria for the award is based on measurable impact and includes depth of involvement, long-term commitment, and if there is firm culture integration.

“I am proud of Quorum’s commitment to giving back to our community and honored to be recognized by Sanctuary for that effort,” said Mazzetti. “The Sanctuary Cares Award enables FWSF to fund one full scholarship for an undergraduate student, supporting its mission of advancing the careers of women in finance.”

[See the video of the presentation of the Sanctuary Cares Award.](#)

FORBES RANKINGS FOCUS ON QUALITY

Quorum was listed on the *Forbes* [2023 Top RIA Firms](#), and all four partners were named to the 2023 list of [Best-In-State Wealth Advisors](#), with Mazzetti and Yue also being named to [the 2023 Top Women Wealth Advisors \(Best-In-State\)](#).

“I am truly humbled by the recognition we have received in the short time Quorum has been independent,” said Barry. “To be ranked by Forbes as a Top RIA Firm is an affirmation of the quality and breadth of the service we provide to our clients.”

“These recognitions affirm our team’s mission and focus on financial education, literacy and wellness, which can exponentially impact the lives of so many,” said Yue. “We take our relationships with our clients seriously, and our rankings make me proud to be part of this firm.”

The *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 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 who 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](#).

ABOUT QUORUM PRIVATE WEALTH

Quorum Private Wealth was founded in 2021 by seasoned professionals Mike Barry, CPFA, C(k)P®, CIMA®, Kelly Milligan, CPWA®, CRPC®, C(k)P®, CPFA, Sue English Mazzetti, CPFA, CRPC®, and Melissa Yue, CFP®. With over 75 years of combined experience, the team is committed to offering objective financial advice, planning, and comprehensive solutions to simplify financial challenges on a range of topics, from investments and insurance to estate planning and taxes. As an independently owned and operated wealth management firm, Quorum

maintains the freedom and flexibility to prioritize clients' best interests. Affiliated with Sanctuary Securities Inc. (Member FINRA, SIPC) and Sanctuary Advisors, LLC, an SEC Registered Investment Advisor, Quorum upholds the highest standards of integrity and professionalism. To learn more, visit www.QuorumPW.com.

###