NEWS

For Immediate Release

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Amy Braun-Bostich Named to Forbes' 2023 Top Women Wealth Advisors Best-In-State List

In addition, wealth management firm releases educational resources for retirees and investors

CANONSBURG, PA (June 1, 2023) – Amy Braun-Bostich, Founding Partner and CEO of Braun-Bostich & Associates, an SEC Registered Investment Advisory and comprehensive financial planning firm located in greater Pittsburgh, was named to America's Top Women Wealth Advisors Best-In-State list for 2023 by *Forbes*.

In *Forbes*' seventh annual Top Women Wealth Advisors list, which included 1,697 women advisors from across the country, Braun-Bostich ranked #26 in the state of Pennsylvania. This is the second consecutive year that Braun-Bostich was included in this prestigious list after coming in at #31 in the state of Pennsylvania in last year's rankings.

"I am very proud to be named as one of the top women wealth advisors in Pennsylvania," said Amy Braun-Bostich, MSFP, CFP®, CFS®, APMA®, CLTC®. "We work hard every day to bring value to our clients' lives, and this listing further validates the work we've been doing to help our clients reach their financial and life goals."

Forbes' rankings, developed by SHOOK Research, are 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, and compliance records, as well as quantitative data such as revenue trends 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 see the full list of *Forbes*' 2023 Top Women Best-In-State Wealth Advisors, please click here.

BRAUN-BOSTICH SHARES EDUCATIONAL RESOURCES FOR INVESTORS

To provide educational resources and insights for retirees and investors, Braun-Bostich & Associates recently released four comprehensive checklists geared toward different client demographics that the firm specializes in serving: retirees and pre-retirees, medical professionals, academic professionals and educators, and next-gen accumulators.

For retirees and pre-retirees, the firm created a checklist titled "What Issues Should I Consider Before I Retire?", which includes tips and items that retirees and pre-retirees should consider around cash flow, healthcare, insurance, debt, tax planning, estate planning, and more.

For medical professionals, the firm created a checklist titled "What Issues Should I Consider When Paying Off My Student Loans?", which covers various elements that doctors and other medical professionals should know about when planning to pay off loans, including cash flow issues, loan repayment plans, federal vs. private loans, loan consolidation and refinancing, tax issues, and more.

For academic professionals, the firm created a checklist titled "What Issues Should I Consider When Reviewing Estate Planning Docs?", which covers estate planning elements that professors and educators should be on top of, including details and considerations on power of attorney, living will, last will and testament, trusts, beneficiary designations, and more.

For next-gen accumulators, the firm created a checklist titled "What Issues Should I Consider When Starting Out Financially", which includes tips and items that next-gen investors and young, savvy savers should consider around personal finance, cash flow, budgeting, savings, taxes, debt, risk management, and more.

All of these helpful checklists and other educational resources can be accessed on the 'Who We Serve' page of the Braun-Bostich & Associates website.

ABOUT BRAUN-BOSTICH & ASSOCIATES

Braun-Bostich & Associates is a comprehensive financial planning firm and Registered Investment Advisor based in Canonsburg, PA, delivering a range of wealth management solutions to high-net-worth individuals, families, and businesses in order to help them meet their goals and optimize their financial life. Founded by Amy Braun-Bostich, CEO and Founding Partner, Braun-Bostich & Associates is focused on securing the wellbeing of clients and their loved ones for years to come. By creating strategies designed for their clients' unique needs, they help develop a roadmap to financial independence. Learn more at www.Braun-Bostich.com.

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