NEWS

For Immediate Release

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Bogart Wealth Introduces Executive Leader Jeffrey Fuhrman as President

Seasoned industry executive fills leadership role at surging independent RIA firm led by James Bogart

MCLEAN, VA (February 25, 2025) – Bogart Wealth, an award-winning, independent wealth management and Registered Investment Advisory firm, today announced that it has introduced Jeffrey Fuhrman, an experienced industry executive, to the team as President.

"We're thrilled to announce **Jeffrey Fuhrman** as the new President of Bogart Wealth and introduce him to the team," said **James Bogart, CFP®, ChFC®**, CEO & Founder of Bogart Wealth. "Jeff has an incredible track record of leading firms across a variety of industries through significant growth and transformation, and we're confident that he'll be an asset in aiding our growth efforts for years to come."

As part of the hiring, James Bogart is relinquishing the President role to Fuhrman while maintaining the title of CEO & Founder.

"I'm very excited to join Bogart Wealth at such a defining time in its evolution," said Fuhrman. "In getting to know James, I've been impressed with his dedication to client care, his commitment to a growth mindset, and his ambitious vision for the future. He has built an impressive organization, and I look forward to working alongside the team to contribute to its continued success."

Bogart Wealth has experienced rapid organic growth in recent years, more than quadrupling assets under management (AUM) in the past 5 years while continuing to provide a high level of service to clients, including comprehensive financial planning and wealth management services. The firm now sits at approximately $3B in assets under advisement (AUA), including $2.7B AUM.

Bogart Wealth has also hired over 30 new staff members during that time period, growing the team with competent, credentialed professionals in order to serve their growing client base. This growth has been aided by the launch of the firm's Advisor Growth Track (AGT), a professional growth and training program designed to help new and experienced talent thrive and grow under the mentorship of a fast-growing RIA firm in a collaborative, high-achieving environment.

In January 2025, Bogart Wealth closed on a minority, long-duration investment from Constellation Wealth Capital (CWC), a long-term strategic investor that provides capital solutions exclusively to wealth management businesses and multi-family offices, while remaining a proudly independent registered investment adviser (RIA)[1] with employees being the overwhelming majority owners of the business. This minority investment in Bogart Wealth will be used to further enhance the firm's client services, technology solutions, recruitment initiatives, marketing activities, and more.

ABOUT JEFFREY FUHRMAN

Jeffrey Fuhrman is a seasoned executive with a 30-year track record of driving business growth, optimizing operations, and building high-performing teams. As President of Bogart Wealth, he will lead the firm's initiatives to enhance growth, expand capabilities, and strengthen its operational foundation.

With deep leadership expertise, Fuhrman specializes in scaling organizations, improving efficiency, and executing high-impact strategies that drive long-term success.

Before joining Bogart Wealth, Fuhrman was a Partner and President of Coastal Bridge Advisors, an independent RIA serving high-net-worth and ultra-high-net-worth clients. During his 11+ year tenure, he led strategic, financial, and operational initiatives across the organization, helping position the firm as an industry leader.

Previously, Fuhrman was President of IMG Artists, a global leader in arts and entertainment management with offices worldwide, and President of Gemini Voice Solutions, a Blackstone-backed technology firm specializing in VoIP technology. Earlier in his career, he was an investment banker at Salomon Smith Barney. He holds an MBA from Columbia University and a BA from Clark University.

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 founder and CEO James Bogart, their mission is to help clients achieve financial peace of mind by preserving and maximizing intergenerational wealth. As an RIA, Bogart Wealth is held to a fiduciary standard, which requires placing client interests ahead of their own. The firm's boutique size further enables a focus on providing exceptional client service. 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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[1] Registration of an adviser does not imply a certain level of skill or training.