KEY FINANCIAL, INC.
Wealth Management With Wisdom & Care

Forbes Ranks Key Financial's Patti Brennan Top Wealth Advisor 2017

WEST CHESTER, PA, October 16, 2017 (GLOBE NEWSWIRE) – This past week Key Financial announced their CEO and President Patti Brennan CFP®, CFS has been named one of Americas Top 250 Wealth Advisors in America by Forbes magazine. From a starting pool of 20,000 applicants, SHOOK Research Analysts whittled down the pool to 250 elites through a rigorous and comprehensive algorithm process.

For consideration, applicants must meet specific quantitative data – including retention, a minimum seven years' experience, and a clean compliance record. However, the Forbes ranking is largely accumulated through qualitative data, collected through in person and telephone interviews. "SHOOK research creates ranking of role models," says founder and President RJ Shook. "Advisors that are leading the way in offering best practices and providing a high quality experience for clients."

President and CEO Patti Brennan was honored to receive the ranking. "I'm so honored to receive this award, notable not only for its depth of scrutiny, but the level of discernment of industry professional experts. Notable not only for its high standards, but the extra level of scrutiny from unbiased industry experts."

To date, Key Financial oversees $694 in total AUM, with a typical account size from $2-5 million. Their broker dealer, Advisor Group, is one of the nation's largest networks of independent financial advisors, overseeing over 4,500 advisors in its network. Brennan has also been recognized by Barron's for the past ten years as one of the Top 100 Women Financial Advisors in America and also one of the Top 1200 Financial Advisors in America. Once again, Financial Times ranked Brennan as a Top 400 Advisor as well, and most notably, Patti was ranked # 15 in Forbes Top 100 Women Wealth Advisor for the second consecutive year in a row.

On a local level, Brennan proudly serves on the Board for the YMCA of Greater Brandywine and Cuddle My Kids. She has formerly served on the Boards of the Chester County Economic Development Council, SEEDCO and Penn Medicine Chester County Hospital. As the President and CEO of Key Financial for more than 28 years, Brennan provides comprehensive wealth management with integrated strategies that are unique to each client. Known for her ability to see the impact of the "little details" on the big picture, Brennan is known for communicating complex financial concepts in simple, understandable and meaningful terms.

Brennan is quick to credit her "deep bench" in providing client satisfaction that exceeds expectation. "I have a brilliant and dedicated team, and recognize that financial planning needs change in various seasons of life. As the family's trusted advisor, we serve those who want to improve their net worth."

Key Financial, Inc. provides comprehensive financial planning and wealth management services and is located at 1045 Andrew Drive Suite A West Chester, PA. For information about the firm's planning services or to speak with Patti Brennan, call (610) 429-9050 or visit www.keyfinancialinc.com.

**The Forbes ranking of America's Top Wealth Advisors, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors with a minimum of seven years of experience and weighing factors like revenue trends, assets under management, compliance records, industry experience and best practices learned through telephone and in-person interviews. There is no fee in exchange for rankings.*

The Financial Times Top 400 Financial Advisors is an independent listing produced by the Financial Times (March, 2017). The FT 400 is based on data gathered from firms and verified by broker-dealer home offices, regulatory disclosures, and the FT's research. The listing reflects each advisor's performance in six primary areas, including assets under management, asset growth, compliance record, experience, credentials and accessibility as identified by the FT. Neither the brokerages nor the advisors pay a fee to The Financial Times in exchange for inclusion in the FT 400.

The "Barron's Winner's Circle Top 1200" is a select group of individuals who are screened on a number of different criteria. Among the factors that advisors are assessed include their assets under management, revenues, the quality of service provided to clients, and their adherence to high standards of industry regulatory compliance. Portfolio performance is not a factor. Please see www.barrons.com for more information. The "Barron's Winner's Circle Top 100" is a select group of individuals who are screened on a number of different criteria. Among factors the survey takes into consideration are the overall size and success of practices, the quality of service provided to clients, adherence to high standards of industry regulatory compliance, and leadership in "best practices" of wealth management. Portfolio performance is not a factor. Please see www.barrons.com for more information.