



Forbes Ranks Key Financial's Patti Brennan #4 Wealth Advisor in Pennsylvania

WEST CHESTER, PA, February 19, 2018 (GLOBE NEWSWIRE) – Key Financial, Inc. of West Chester, PA has just announced that their President and CEO Patti Brennan, CFP®, CFS has been named by Forbes as Best-In-State Wealth Advisors for 2018. Patti is ranked #4 in the state of Pennsylvania amongst all male and female wealth advisors. Using a comprehensive algorithm process, SHOOK Research analysts whittled down a nominated field of over 21,000 advisors to an impressive list of 88 top advisors in the state. For consideration, applicants must meet specific quantitative data – including retention, revenue 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 President RJ Shook. “Advisors that are leading the way in offering the best practices and providing a high quality experience for clients.”

“It’s an honor to be placed in the ranks amongst such an esteemed group of individuals,” said Brennan. “However, more than anything, this award speaks volumes to my team of 22. I believe Philadelphia Eagles head coach Doug Pederson put it best when asked about the reason for his team’s success: ‘An individual can make a difference, but a team makes a miracle.’ I wouldn’t be here if it were not for my bright and dedicated team. Our client family benefits, on a daily basis, from the intellectual capital of this incredibly talented group of individuals. They are truly the ones who deserve this recognition.” This year Key Financial marked their 30th anniversary providing wealth management with wisdom and care to clients, both locally and nationally.

Brennan’s honorable reputation and credibility has been consistently recognized by Barron’s Magazine for twelve years straight, earning her a spot in the Top 100 Women Advisors. In addition, Brennan has been recognized by Forbes as a Top 100 Financial Advisor in America, and also by the Financial Times Top 400 Advisor in the Nation. Locally, Brennan sits on the Board for the YMCA of Greater Brandywine, is a former Board Member of Penn Medicine Chester County Hospital as well as former Chairwoman of the National Advisory Board for Royal Alliance.

With assets under management over \$900 million, 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.

Securities offered through Royal Alliance Associates, Inc., member FINRA/SIPC. Insurance services offered through Patricia Brennan are independent of Royal Alliance Associates, Inc. Advisory services offered through Key Financial, Inc., a registered investment advisor not affiliated with Royal Alliance Associates, Inc.

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, 2016). 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 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.