

Forbes

INVESTING



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TOP WOMEN WEALTH ADVISORS

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PHOTO SUPPLIED BY KEY FINANCIAL, INC.

RANK	NAME	COMPANY	CITY	STATE	MINIMUM ACCOUNT SIZE FOR NEW BUSINESS	TEAM ASSETS (CUSTODIED)	TYPICAL SIZE OF HOUSEHOLD ACCOUNTS
16	PATTI BRENNAN	KEY FINANCIAL, INC.	WEST CHESTER	PENNSYLVANIA	\$500K	\$599M	\$2-5M

Methodology

The *Forbes* ranking of America's Top Women Wealth Advisors, developed by SHOOK Research, 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. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Neither *Forbes* or SHOOK receive a fee in exchange for rankings. (For the full list and more, visit: <https://www.forbes.com/top-women-advisors>. Advisors can complete a survey for upcoming rankings here: <https://shookresearch.com>).