

Leading Women in Business - Philadelphia



Photos: Susan Gouge with Peylan Photography

She's consistently ranked one of America's top financial advisors. She's been recognized by *Forbes*, *Barron's*, *Fortune*, and *Financial Times*. She's doled out advice in the *Wall Street Journal*, *Bloomberg Businessweek*, *Worth*, and *Kiplinger's*. But in spite of all her success, Patti Brennan hasn't lost sight of what got her into financial advising in the first place.

"We've always believed that your money is just a means to an end, so we're here to optimize your efforts so you can live the life you want to live," says Patti. "In other words, you are not a pie chart."

As CEO of her firm, Patti still personally meets with every client, and then, she works alongside her near 30-member team to develop the right plan for their financial needs.

"We work best alongside clients who have mature portfolios because this is where the presence of an advisor makes the most sense," says Patti. "When I'm looking at a younger portfolio, I'll often give those clients a specific strategy to focus on. My goal is to empower them until partnering with an advisor actually makes sense."

After 35 years in the industry, she's built a firm that has a near 100 percent client retention rate, but all that success, she says, has nothing to do with her. "I'm just little Patti Brennan from West Chester, Pennsylvania," she says. "This is about my team and our culture here. Our work isn't about numbers. It's about people and their futures, and this is why we treat every client like they're the only client we have."



THE **Patti** ^{SHOW}
Brennan

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