NEWS

For Immediate Release

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Bogart Wealth Listed as Top RIA Firm in Virginia in Forbes, CEO James Bogart Named a Barron's Top 100 Independent Financial Advisor

Leading wealth management firm also recognized in Inc. 5000, ThinkAdvisor, and Financial Advisor Magazine

MCLEAN, VA (November 7, 2024) – Bogart Wealth, an award-winning, independent wealth management and Registered Investment Advisory firm, was named to multiple lists of top financial advisors and fastest-growing companies in national and industry publications over the last few months. This recognition was highlighted by the firm being named to *Forbes'* 2024 list of America's Top RIA Firms and CEO James Bogart, CFP®, ChFC® being selected as one of *Barron's* Top 100 Independent Financial Advisors.

In *Barron's* 2024 list of Top 100 Independent Financial Advisors, James Bogart came in at #57 in the national ranking of top independent advisors. Although this was Bogart's first year making the Top 100 list, he has been featured in *Barron's* Top 1,200 Financial Advisors list for the last three years – ranking #5 in the state of Virginia in the 2024 list.

In *Forbes'* 2024 list of America's Top RIA Firms, Bogart Wealth was ranked #23 nationally and was listed as the top overall firm in Virginia. Bogart Wealth has been featured in the Top RIA Firms ranking since the list's inception in 2022, and James Bogart and Senior Vice President Nell Cordick, CFP® have both been previously featured in various individual advisor rankings.

In addition, Bogart Wealth ranked #3,059 overall in the 2024 Inc. 5000 list, *Inc. Magazine's* annual ranking of America's fastest-growing private companies, and was included in *Financial Advisor Magazine's* 2024 Top RIA Rankings, ranking #167 on the nationwide list of largest RIAs. Bogart Wealth also received two finalist nods in the 2024 *ThinkAdvisor* Luminaries Awards, with the firm making the final cut for Thought Leadership & Education among RIA firms, as well as Financial Advisor Patrick Marcinko, CFP® being named a Next-Gen Rising Star finalist.

"It's a sincere honor to be recognized by these prestigious publications," said James Bogart. "All of this recognition reinforces the value we strive to bring to our clients' lives on a daily basis. None of these achievements would be possible without the dedication of our fantastic team."

FORBES AND BARRON'S RANKINGS CRITERIA AND METHODOLOGY

The *Forbes* ranking of America's Top RIA Firms, developed by SHOOK Research, is based on an algorithm of qualitative criteria – mostly gained through telephone, virtual and in-person due diligence interviews – and quantitative data. The algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience, leadership and senior principals, and other factors that encompass best practices and a firm's approach to working with clients. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither *Forbes* nor SHOOK receive a fee in exchange for rankings.

To learn more about the *Forbes* Top RIA Firms ranking methodology, click here. To see the full list of *Forbes*' 2024 Best-In-State Wealth Advisors, click here.

The goal of the *Barron's* Top Advisor rankings is to shine a spotlight on the nation's best financial advisors, with an eye toward raising standards in the industry. Advisors who wish to be ranked must first pass a prequalification process aimed at ensuring that those in the mix are experienced and sophisticated advisors. Those who meet the criteria then fill out a survey with more than 100 questions about their practices. We verify that data with the advisors' firms and with regulatory databases, then we apply our rankings formula to the data to generate a ranking. The formula features three major categories of calculations: 1. Assets, 2. Revenue, and 3. Quality of practice.

To learn more about the *Barron's* Top Advisor ranking methodology, click here. To see the full list of *Barron's* Top 100 Independent Financial Advisors, click here.

RANKED IN INC. 5000 FOR FOURTH CONSECUTIVE YEAR

For the fourth consecutive year, Bogart Wealth was included in the Inc. 5000 list, *Inc. Magazine's* annual ranking of America's fastest-growing private companies.* In the 2024 rankings, the firm was ranked #3,059, climbing nearly 500 spots from their ranking of #3,547 in the 2023 list.

Bogart Wealth made the list thanks to their 163% 3-year revenue growth from 2021-2023. The firm continues to experience rapid growth in all facets and has nearly quadrupled assets under management (AUM) in the past four years. Bogart Wealth has also been rapidly growing and expanding their team, hiring nearly 30 new employees during that time.

To see Bogart Wealth's Inc. 5000 profile along with the full 2024 rankings, please click here. To learn more about the methodology and verification process for the Inc. 5000 list, please click here.

NAMED TOP RIA FIRM BY FINANCIAL ADVISOR MAGAZINE

Bogart Wealth was recently listed in Financial Advisor Magazine's 2024 Top RIA Rankings, listing the top 431 Registered Investment Advisory firms in the U.S. by AUM.

Bogart Wealth ranked #167 in the list of largest RIAs (up 25 spots from the 2023 rankings), with year-end 2023 assets totaling over $2.6B and 17.92% growth in assets from 2022 to 2023. Bogart Wealth has been included in the *Financial Advisor* Top RIA rankings every year since 2019.

Rankings are compiled by AUM, and discretionary and nondiscretionary AUM are sourced from the firms' Form ADVs. To see *Financial Advisor Magazine's* full RIA rankings, please click here.

FINALIST NODS IN THINKADVISOR LUMINARIES AWARDS

In the 2024 *ThinkAdvisor* Luminaries Awards, Bogart Wealth was named a finalist for Thought Leadership and Education among RIA firms, highlighting all of the educational content and resources the firm produces, including blog content, educational webinars, thought leadership content via industry and national publications, and the firm's new podcast launched earlier this year, THE BOGART EFFECT: A Wealthy Wisdom Podcast. The nomination also highlighted Advisor Growth Track®, the firm's professional growth and training program designed to help new and experienced talent thrive and grow under the mentorship of one of the fastest-growing RIA firms in the country in a collaborative, team-oriented, high-achieving environment.

In addition, Financial Advisor Patrick Marcinko, CFP® was named a finalist in the Next-Gen Rising Star category, highlighting his quick ascent to the role of an advisor at the firm, his participation in local organizations and industry groups – including being the Director of NexGen for the Financial Planning Association National Capital Area (FPA NCA) chapter – as well as the thought leadership he's provided through the firm's webinars, podcasts, and commentary in third-party publications. His expertise has been featured in *Fortune*, *Business Insider*, *USA Today*, *U.S. News and World Report*, and more.

The Luminaries Awards recognize the visionary firms and individuals driving innovation and making a transformative impact on both the industry and the profession. All finalists and winners are selected by a distinguished and diverse panel of judges from across the financial advice industry, as well as by the *ThinkAdvisor* editorial team. The 2024 Luminaries program will culminate at the 4th Annual *ThinkAdvisor* Luminaries Awards ceremony held in Las Vegas on December 11th.

To see the full list of finalists and to learn more about the 2024 *ThinkAdvisor* Luminaries, please click here.

BOGART WEALTH'S LATEST EDUCATIONAL RESOURCES

As a fiduciary, Bogart Wealth takes great pride and responsibility in being financial educators. This was the catalyst for launching their new podcast earlier this year, THE BOGART EFFECT: A Wealthy Wisdom Podcast, featuring James Bogart and his team of financial advisors and special guests having candid conversations about everything related to personal finance. Topics of recent episodes include retirement cash flow planning, today's housing market, how elections affect the market, risk management, and common retirement mistakes. To access all of THE BOGART EFFECT podcast episodes, click here.

The firm's latest educational webinars cover topics such as interest rates, mega backdoor Roth strategies, planning for the unexpected, long-term care planning, social security, and more. Upcoming webinars include Tax Planning for 2025 with Financial Advisor Brian Windsor, CFP® and Net Unrealized Appreciation with Financial Advisor Morgan Veth, CFP®. To access all of Bogart Wealth's webinars, click here.

In addition, the firm produces Special Guides to inform and advise on in-depth planning strategies and topics. The latest guides include deep dives into Irrevocable Life Insurance Trusts, Annuities, and Different Types of Retirement Accounts. To access all of the Bogart Wealth Guides, click here.

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 President and CEO James Bogart, their mission is to help clients achieve financial peace of mind by preserving and maximizing intergenerational wealth. As a Registered Investment Advisor (RIA), Bogart Wealth is held to a fiduciary standard, which gives clients confidence in knowing that everything the firm does is always in their best interest. Clients of Bogart Wealth enjoy an extremely high level of service, and the firm's boutique size enables multiple advisors to become familiar with each client and their financial plan. 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.

IMPORTANT DISCLOSURE INFORMATION

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