



Top  
Financial  
Advisers  
2018

## **Congress Wealth Management LLC Named to 2018 Financial Times 300 Top Registered Investment Advisers**

**July 6, 2018** – Congress Wealth Management LLC is pleased to announce it has been named to the 2018 edition of the Financial Times 300 Top Registered Investment Advisers. The list recognizes independent RIA firms from across the U.S.

760 RIA firms applied for consideration, having met a minimum set of criteria. Applicants were then graded on six factors: assets under management (AUM); AUM growth rate; years in existence; advanced industry credentials of the firm’s advisers; online accessibility; and compliance records. There are no fees or other considerations required of RIAs that apply for the FT 300.

The final FT 300 represents an impressive cohort of elite RIA firms, as the “average” practice in this year’s list has been in existence for over 22 years and manages \$4 billion in assets. The FT 300 Top RIAs hail from 38 states and Washington, D.C. This is the fifth annual FT 300 list, produced independently by the Financial Times in collaboration with Ignites Research, a subsidiary of the FT that provides business intelligence on the asset management industry. The complete list can be viewed here:

<https://www.ft.com/reports/300-top-investment-advisers>

Congress Wealth Management LLC is a Boston-based, SEC-registered independent investment management firm, developing innovative wealth solutions for high-net-worth individuals, families, foundations and endowments. Our Financial Advisors take a personalized approach to relationship management, and interactions are always tailored to the preferences of each client.

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For more information about Congress Wealth Management LLC please contact Meghan Leach at 617-428-7629

The Financial Times 300 Top Registered Investment Advisers is an independent listing produced annually by the Financial Times (June 2018). The FT 300 is based on data gathered from RIA firms, regulatory disclosures, and the FT’s research. The listing reflected each practice’s performance in six primary areas: assets under management, asset growth, compliance record, years in existence, credentials and online accessibility. This award does not evaluate the quality of services provided to clients and is not indicative of the practice’s future performance. Neither the RIA firms nor their employees pay a fee to The Financial Times in exchange for inclusion in the FT 300. This rating by the Financial Times is not indicative of our future performance and may not be representative of any one client’s experience.