



Congress Wealth Management LLC Named to 2020 Financial Times 300 Top Registered Investment Advisers

July 30, 2020 – Congress Wealth Management LLC (“CWM”) is pleased to announce it has been named to the 2020 edition of the Financial Times 300 Top Registered Investment Advisers. The list recognizes top independent RIA firms from across the U.S. This is the fourth time in the past five years that CWM has been given this honor.

This is the seventh annual FT 300 list, produced independently by Ignites Research, a division of Money-Media, Inc., on behalf of the Financial Times. Ignites Research provides business intelligence on investment management.

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 median AUM of this year’s group is \$1.9 billion. The FT 300 Top RIAs represent 39 different states and Washington, D.C.

The FT 300 is one in series of rankings of top advisers by the Financial Times, including the FT 401 (DC retirement plan advisers) and the FT 400 (broker-dealer advisers). 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.

For more information about Congress Wealth Management LLC please call us at (617) 428-7600 or visit our web site at www.congresswealth.com

The Financial Times 300 Top Registered Investment Advisers is an independent listing produced annually by Ignites Research, a division of Money-Media, Inc., on behalf of the Financial Times (July 2020). 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. Over 750 qualified firms applied for the award, 300 of which were selected (40%). 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.