

NEWS

For immediate release

Circle Wealth Management, LLC Named to 2015 Financial Times 300 Top Registered Investment Advisers

June 18, 2015 – Circle Wealth Management is pleased to announce that it has been named to the Financial Times 300 Top Registered Investment Advisers, as of June 18, 2015. The list recognizes top independent RIA firms from across the U.S.

This is the second annual FT 300 list, produced independently by the FT in collaboration with Ignites Research, a subsidiary of the FT that provides business intelligence on the investment management industry. More than 2,000 elite RIA firms were invited to apply for consideration, based on their assets under management (AUM). The 630 RIA firms that applied were then graded six criteria: AUM; AUM growth rate; years in existence; advanced industry credentials; online accessibility; and compliance records.

The “average” FT 300 firm has been in existence for 23 years and manages \$2.6 billion in assets. The 300 top RIAs hail from 34 states and Washington, D.C., and, on average, saw their total AUM rise by 18% in 2014.

The FT 300 is one in series of rankings of top advisers that the FT developed in partnership with Ignites Research: the FT 401 (DC retirement plan advisers); the FT 400 (financial advisers from traditional broker-dealer firms); and the FT 100 (women financial advisers).