FINANCIAL TIMES

Top Financial Advisers 2018

Circle Wealth Management Named to 2018 Financial Times 300 Top Registered Investment Advisers

June 28, 2018 – Circle Wealth Management is pleased to announce it has been named to the 2018 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 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.

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.

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).