



## Klingenstein Fields Wealth Advisors (KFWA) Ranked in Financial Times (FT) 2018 Top 300 Registered Investment Advisers

**KFWA is pleased to announce it has been named to the 2018 edition of the FT 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 FT in collaboration with Ignites Research, a subsidiary of the FT that provides business intelligence on the asset management industry.

In order to be considered for inclusion, RIAs must apply and meet a minimum set of criteria. Applicants are 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. Rankings are objective, and the FT receives no remunerations or fees from RIAs. 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.

KFWA is honored to be included in this impressive group of elite RIA firms, and we appreciate the continued confidence that our clients place in KFWA. We look forward to the opportunity to serve your needs now and in the future.

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### Important Disclosures

The FT 300 is one in a 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 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.

Past performance may not be indicative of future results. Different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/or investment strategies recommended and/or undertaken by Klingenstein Fields Wealth Advisors ("KFWA")), or any non-investment related services, will be profitable, equal any historical performance level(s), be suitable for your portfolio or individual situation, or prove successful. KFWA is neither a law firm nor accounting firm, and no portion of its services should be construed as legal or accounting advice. If you are a KFWA client, please remember that it remains your responsibility to advise KFWA, in writing, if there are any changes in your personal/financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services. A copy of our current written disclosure statement discussing our advisory services and fees is available upon request or by clicking [here](#). Please read the expanded disclosure in the [linked report](#) or by visiting our website at [www.klingenstein.com](http://www.klingenstein.com).