

SAVANT



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CNN Underscored Names Savant Wealth Management a Top 10 Financial Advisor Firm

ROCKFORD, Ill. (March 20, 2024) — [Savant Wealth Management](#), a nationally recognized, fee-only registered investment adviser (RIA), is pleased to announce it was named to CNN Underscored's list of the [10 Best Financial Advisors of March 2024](#).

To determine the top financial advisors, CNN Underscored's editors screened over 700 RIA firms headquartered in the U.S. with more than \$1 billion total assets under management (AUM) and who had filed the latest Form ADV on or after March 31, 2023. To be considered, the firms must provide financial services, not receive commissions, and not employ registered broker-dealer representatives, insurance companies or agencies, among others. Additionally, the AUM had to meet specific criteria, and the firm had to have no disclosures against it that would preclude its inclusion on the list. Savant did not pay a fee to be included on this list, which was announced Jan. 30.

"It's an honor to be named by CNN Underscored as one of the top 10 RIA firms in the country," said [Brent Brodeski](#), CEO of Savant. "Although the list contained several very large RIAs, it was nice to see an employee-owned firm like ours recognized for the comprehensive work we do for clients, including tax and estate planning, as well as financial planning, retirement planning, and investment management."

In 2023, Savant completed 11 acquisitions — a historic number of deals for the firm. However, we believe Savant's approach to growth differs from typical aggregators or financial buyers, in that it seeks partners who can help provide a better client experience, a deep bench of specialists, and a wide variety of services. Savant's investors bring "patient" capital, seeking solid, long-term growth instead of a quick return on their investment.

2024 CNN Underscored 10 Best Financial Advisors of March 2024: This rating published in March 2024 by CNN Underscored is based on assets under management of at least \$1 billion and latest ADV filing date of 3/31/23 or later. Savant did not pay a fee to be included in this rating.

For more information about Savant Wealth Management, visit savantwealth.com.

About Savant Wealth Management

Savant Wealth Management is a leading independent, [nationally recognized](#), fee-only firm serving clients for over 30 years with approximately \$25.5 billion in assets under management and assets under advisement (as of 12/31/2023). As a trusted advisor, Savant Wealth Management offers investment management, financial planning, retirement plan and family office services to financially established individuals and institutions. Savant also offers corporate accounting, tax preparation, payroll and consulting through its affiliate, Savant Tax & Consulting, and estate planning document preparation and other legal services through its affiliated law firm, Savant Legal LLP.

Savant is a registered Investment advisor. Past performance may not be indicative of future results. Different types of investments involve varying degrees of risk. Neither rankings and/or recognitions by unaffiliated rating services, publications, media, or other organizations, nor the achievement of any professional designation, certification, degree, or license, or any amount of prior experience or success, should be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if Savant is engaged, or continues to be engaged, to provide investment advisory services. Please read our [Important Disclosures](#) at savantwealth.com.

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