

Forbes Ranks Patti Brennan #1 Women Top Advisor In PA and #12 Women Top Advisor In The Nation for 2023!

Patti Brennan

CFP[®], CFS and CEO of Key Financial, Inc



KEY FINANCIAL, INC.
Wealth Management With Wisdom & Care

While she is now recognized as one of the top advisors in America, her path was *unlike anyone else's*.

After graduating from Georgetown University with a degree in Nursing, Patti worked in oncology and as an ICU nurse before channeling her compassion for others to work as a financial planner.

Her intellectual capacity is as boundless as her energy, and in 1990 Patti founded Key Financial, Inc. while also raising four children.

A combination of interpersonal skills and keen attention to detail has helped Key Financial grow into a firm that manages just under **\$2 billion**, with a high retention rate. Patti's vision, her ability to solve problems, and the desire to serve each client is infectious and shared by every member of her team.

Clients have security knowing Patti's deep bench is unlike any other, and they will be taken care of - like family - for the rest of their lives, and beyond.

Through a culture rooted in the tenets of wisdom, perspective, and commitment, the Key Financial team provides each client with a personalized financial plan with multiple scenarios, stress tests, and what-ifs. This approach to concierge service has resulted in a new standard for the client experience. This paired with Patti's unique ability to communicate complex financial concepts through understandable terms, has garnered recognition by Forbes, The Financial Times, and Barron's as one of the Top Advisors in America year after year for almost two decades.

KEY FINANCIAL INC.

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While Patti Brennan is known internationally for her comprehensive services, she also maintains a close connection to her community by holding seats on the boards of various institutions and nonprofits, such as University of Pennsylvania Chester County Hospital, the YMCA of Greater Brandywine, and Connect Through Cancer.

Patti is invited to speak at conferences throughout America and abroad. She has guided standing room only audiences with her wisdom, perspective, and practical advice through some of the most challenging times in our country. But what differentiates Key Financial is the culture, with a focus on client experience and outcomes. Patti has never forgotten her days at the bedside and advocates for every client with the compassion and care that has set a new gold standard for the industry.



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