Seventy2 Capital Wealth Management named to 2024 Forbes Americas Top Wealth Management Teams: High Net Worth

BETHESDA, MD, UNITED STATES, November 21, 2024 /EINPresswire.com/ -- Seventy2 Capital Wealth Management, a client-centered, independent wealth management practice headquartered in the Washington DC – Baltimore region, announced today that they have been named to the 2024 Forbes Americas Top Wealth Management Teams: High Net Worth list.

> It is an honor to be recognized by Forbes as a top team in the country... We are proud of what our team has accomplished and look forward to continued success over the years to come.”
>
> *Paul Carlson, CEO & Co-Founder, Seventy2 Capital Wealth Management*

“It is an honor to be recognized by Forbes as a top team in the country,” said Paul Carlson, CEO & Co-Founder of Seventy2 Capital. “Our practice has grown rapidly from around $200 million in assets under management at our founding in December 2016 to over $9 billion as of November 2024. We are proud of what our team has accomplished and look forward to continued success over the years to come.”

As described by Forbes, wealth management teams included in their list tend to include multiple financial advisors ranging in various areas of expertise, as well as proven track records in preserving multigenerational wealth. Seventy2 Capital, for example, is home to 63 advisors who provide resources for retirement, education, executive, corporate, and estate planning services. 100 teams were included in the third annual Forbes/Shook Top Wealth Management Teams High Net Worth list, with cumulative assets of nearly $490 billion. SHOOK Research considered both quantitative and qualitative data, including interviews, to rank teams in the Forbes list. View their methodology and the full list here.

About Seventy2 Capital Wealth Management

Seventy2 Capital is a client-focused, growth-oriented wealth management practice dedicated to achieving client goals. We offer the benefits of independence with a deep bench of thoughtful, talented team members and the backing of Wells Fargo Advisors Financial Network. We believe this model, paired with our “can do, will do” attitude, enables great service and optimizes client outcomes. In recognition of these efforts, we have been recognized as one of the 2024 Forbes Top Wealth Management Teams High Net Worth and 2024 Barron’s Top 250 Private Wealth Management Teams. Visit Seventy2Capital.com to learn more.

2024 Forbes Top Wealth Management Teams High Net Worth: Awarded November 2024; Data compiled by SHOOK Research LLC based on the time period from 3/31/23 - 3/31/24 (Source: Forbes.com). The Forbes Top Wealth Management Teams High Net Worth rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria. High Net Worth designates advisors whose account sizes are typically under $10mm, though may have accounts with higher amounts.

2024 Barron’s Top 250 Private Wealth Management Teams: Awarded May 2024; Data Compiled by Barron’s based on the time period from Jan. 2023 – Dec. 2023 (Source: Barrons.com). The Barron’s Top 250 Private Wealth Management Teams are evaluated on a range of factors for the Financial Advisor and their team, who specialize in serving individuals and families. Factors included in the ratings include their previous year’s size and shape, the regulatory records and credentials of their members, and the resources they have at their disposal to serve their client bases. Self-completed questionnaire was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

About Wells Fargo Advisors Financial Network

For more than 20 years, Wells Fargo Advisors Financial Network, the independent contractor business model of Wells Fargo Wealth & Investment Management (WIM), has offered financial advisors more control, flexibility, and growth around business ownership as well as support from one of the nation’s largest financial institutions. WIM provides financial products and services through various bank and brokerage affiliates of Wells Fargo & Company. Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC, Member SIPC (WFAFN), a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Any other referenced entity is a separate entity from WFAFN.

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