

Seventy2 Capital named in 2025 Forbes Best-in-State Wealth Management Teams

BETHESDA, MD, UNITED STATES, January 15, 2025 /EINPresswire.com/ -- Seventy2 Capital Wealth Management, a client-centered, independent wealth management practice headquartered in the Washington DC – Baltimore region, announced today that their practice has been named to the 2025 Forbes Best-in-State Wealth Management Teams list.



Our group has worked hard to grow our business and expand our offerings to clients and, as a result, has seen tremendous growth over the past year. I am proud of the team that we have built.”

Paul Carlson, CEO, Seventy2 Capital Wealth Management

“It is an honor to be recognized again as a Forbes Best-in-State Team!” said Paul Carlson, CEO & Co-Founder of Seventy2 Capital. “Our group has worked hard to grow our business and expand our offerings to clients and, as a result, has seen tremendous growth over the past year. I am proud of the team that we have built and of the work they do to help our clients reach their most important financial goals.”

Ratings on the Forbes Best-in-State Wealth Management Teams list are based on the previous year's industry experience, interviews, compliance records, assets under

management, revenue, and other criteria by SHOOK Research, LLC. Seventy2 Capital ranked as the number 4 team in Maryland.

About 2025 Forbes Best-in-State Wealth Management Teams

Awarded January 2025; Data compiled by SHOOK Research LLC based on the time period from 3/31/23 - 3/31/24 (Source: Forbes.com). The Forbes Best-in-State Wealth Management Teams 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. 11,674 wealth management teams were considered for the rating; 5,331 (45.66% percent of candidates) were named 2025 Forbes Best-in-State Wealth Management Teams.

About Seventy2 Capital

Seventy2 Capital is a full-service, independent wealth management practice committed to supporting individuals, families, and business owners to achieve their financial goals. We are passionate about the work we do for our clients. We form a deep understanding of our client's goals and values and then develop and implement customized strategies that fit those objectives. Seventy2 Capital has been recognized as a Barron's Top 250 Private Wealth Management Team in 2024 and a 2024 Forbes Top Wealth Management Teams, High-Net-Worth. For more information please visit www.seventy2capital.com.

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.

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.

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For more than 20 years, Wells Fargo Advisors Financial Network (FiNet), the independent brokerage arm of Wells Fargo & Company, has simplified independence by partnering with successful financial advisors and fostering a mutual passion for doing what's right for clients. www.wfafinet.com

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC. Seventy2 Capital Wealth Management is a separate entity from WFAFN.

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