

PRESS RELEASE

For More Information:
Donna Patch
Innovest Portfolio Solutions, LLC
303-694-1900 x310

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Wealth Manager

FOR IMMEDIATE RELEASE

***Wealth Manager Announces 2009 Top Wealth Managers
Innovest Portfolio Solutions, LLC Receives #24 Ranking***
Rankings and analysis of largest wealth managers shows that 12% of
Top Wealth Managers grew assets in 2008.

July 1, 2009 Hoboken, NJ—In difficult times, some of the best wealth management firms continue to grow their businesses. That's just one of the key findings from *Wealth Manager's* (a Summit Business Media Publication) annual [Top Wealth Managers Ranking](#) by average assets under management per client. In all, 407 of more than 500 firms that participated in the 9th annual survey, conducted in April and May, made the list, which was formerly known as the Top Dogs.

Wealth Manager's 2009 Top Wealth Managers survey found that, though market and economic conditions were extremely challenging, and the majority of firms' overall assets under management were lower, about 12% of firms gained in total AUM as reported through December 31, 2008.

"For 2009, Top Wealth Managers who participated in our survey took the time to answer twice as many questions as we had asked before, providing critical insights into their businesses," says *Wealth Manager's* Editor in Chief, Kathleen McBride. "The resulting data was so compelling that it attracted the interest and laser-sharp insights of Philip Palaveev, president of Fusion Advisor Network and a former Moss Adams principal, who wrote the analysis of the rankings for 2009 and an exclusive report that's available on our Web site, [WealthManagerWeb.com](#).

In addition, *Wealth Manager* will kick off—with Mr. Palaveev—a quarterly Top Wealth Manager Pulse survey and report, delivering timely information on wealth management each quarter rather than having to wait for next year's survey—enormously valuable in such a volatile environment. The Pulse will also, for the first time, enable participants to suggest questions for the survey.

The Top Wealth Manager Rankings include registered investment advisors; banks, broker/dealers and trust companies are not included in these rankings. (For the full story and the complete list of *Wealth Manager's* 2009 Top Wealth Manager Rankings please [click here](#)).

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5081 Olympic Boulevard
Erlanger, KY 41018 1-800-543-0874