Ropes Wealth Recognized by *Investment News, Boston Business Journal* and *Financial Advisor*

BOSTON (SEPTEMBER 4, 2019) – Ropes Wealth Advisors LLC (Ropes Wealth), a Boston-based investment advisory firm, received three wealth management industry rankings in July 2019.

InvestmentNews ranked Ropes Wealth 11th out of 2,206 qualified fee-only registered advisory firms headquartered in the United States based on total AUM reported on Form ADV to the SEC as of May 1, 2019, and fulfillment of special criteria.

In Financial Advisor's 2019 RIA Survey & Ranking issue, Ropes Wealth ranked 64th out of 683 firms on a national list of top registered investment advisers based on year-end 2018 assets. Ropes Wealth Advisors reported $4.26 billion year-end 2018 assets, a 10.8 percent growth over year-end 2017.

On *The Boston Business Journal*'s annual Largest Independent Investment Advisors in Massachusetts list, Ropes Wealth ranked 17th out of 25 firms, reporting $4.29 billion total assets under management as of June 1, 2019.

"We are pleased to be ranked by *InvestmentNews, Financial Advisor* and *The Boston Business Journal.* We are proud of our continued organic business growth in such a competitive environment," says **Michelle Knight**, chief investment officer and chief economist of Ropes Wealth Advisors. "At Ropes Wealth Advisors, we believe that there is no one-size-fits-all approach to wealth management, and our authentic and truly client-focused approach differentiates us among our peers."

Ropes Wealth Advisors is a trusted partner for families and institutions navigating today's complex and ever-shifting investment, estate planning and tax world. Its mission is to dedicate all of its resources toward preserving and enhancing the wealth and legacy of the clients it serves. Ropes Wealth Advisors manages investments and financial planning in close coordination with its clients' legal and tax advisors as they assist with gift and estate planning, prepare tax returns, consult on philanthropic transfers, and provide trustee and other fiduciary services.

Ropes Wealth Advisors

Ropes Wealth provides customized and unbiased investment management and financial planning advice that is seamlessly integrated with your wealth management strategies.

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IMPORTANT DISCLOSURES: *InvestmentNews* qualified 2,206 firms headquartered in the United States based on data reported on Form ADV to the Securities and Exchange Commission as of May 1, 2019. To qualify, firms must have met the following criteria: (1) latest ADV filing date is either on or after January 1, 2018, (2) total AUM is at least $100M, (3) does not have employees who are registered representatives of a broker-dealer, (4) provided investment advisory services to clients during its most recently completed fiscal year, (5) no more than 50% of amount of regulatory assets under management is attributable to pooled investment vehicles (other than investment companies), (6) no more than 25% of amount of regulatory assets under management is attributable to pension and profit-sharing plans (but not the plan participants), (7) no more than 25% of amount of regulatory assets under management is attributable to corporations or other businesses, (8) does not receive commissions, (9) provides financial planning services, (10) is not actively engaged in business as a broker-dealer (registered or unregistered), (11) is not actively engaged in business as a registered representative of a broker-dealer, (12) has neither a related person who is a broker-dealer/municipal securities dealer/government securities broker or dealer (registered or unregistered) not one who is an insurance company or agency.

Financial Advisor's 2019 ranking is based on surveys submitted by firm representatives. To be eligible for the rankings, firms must be registered investment advisers and provide financial planning and related services to individual clients. Corporate RIA firms and investment adviser representatives (IARs) were not eligible for this survey.

The Boston Business Journal's annual list of largest independent advisers is ranked by total assets under management as of 6/1/19. Information was obtained from firm representatives. The list includes firms headquartered in Massachusetts.

No fees were paid by any individual or third party in order for Ropes Wealth to participate or be selected for these rankings. The results of these rankings should not be interpreted as reflecting the approval or disapproval of Ropes Wealth's services by clients, and is not intended to be indicative of or a promise of future performance.