



FOR IMMEDIATE RELEASE

Contact: Tina Hohman
Tel: 414-291-3855
Email: thohman@clearygull.com



FT 300 Ranking June 2014

**CLEARY GULL NAMED TO *FINANCIAL TIMES*
300 TOP REGISTERED INVESTMENT ADVISERS LIST**
List Debuts in 2014

Milwaukee, WI - June 27, 2014 – The *Financial Times* announced the results of its inaugural 300 Top Registered Investment Advisers list in the United States, and Cleary Gull, an investment advisory firm focused on customized wealth management services for individuals, families and not-for-profits, was named to the list. *Financial Times* indicated that only independent practices were considered.

“We are proud to be named to this prestigious list” said Brian Andrew, president of Cleary Gull. “It is a validation of the service our team provides and our disciplined investment process that is designed to help our clients achieve their desired goals.”

The 2014 *Financial Times* Top 300 Top Registered Investment Advisers list is based on questionnaire data gathered from more than 600 independent registered investment advisory firms about their practices. Investment advisory firms were evaluated in six primary areas of interest to affluent investors: assets under management, asset growth, years the firm has been in existence, industry certifications of staff, SEC compliance record, and online accessibility. The average practice managed more than \$2.5 billion and served 3,000 clients.

About Cleary Gull

Cleary Gull (www.clearygull.com) is an employee-owned firm headquartered in Milwaukee, Wisconsin providing specialized financial services through two operating divisions: Investment Advisory and Investment Banking. Cleary Gull has combined assets under management of \$2.5 billion as of December 31, 2013 and a focus on high net worth individuals, pilots, and not-for-profit hospitals and senior living communities across the nation. Cleary Gull’s investment bankers specialize in providing exclusive advice on sales, mergers, acquisitions, private debt and equity capital placement, typically for transactions from \$10 million to \$200 million.

About the 2014 *Financial Times* 300 Top Registered Investment Advisers List

Being named to the “300 Top Registered Investment Advisers” list is not an endorsement of the adviser, is not indicative of the adviser’s past or future performance, and does not ensure that a client will experience a higher level of performance or results. Third party rankings and recognition from ratings services are no guarantee of future investment success and should not be construed as representative of any one client’s evaluation. The *Financial Times* solicited from more than 2,000 independent registered investment advisory firms; more than 600 (or approximately 30%) of the firms solicited completed and submitted the questionnaire; 300 (or approximately 50%) of the participating firms were selected for the list. To be considered, advisers solicited by the *Financial Times* completed and submitted a questionnaire about their practice. Only those that completed the questionnaire were considered for the list. To qualify for the list, advisers must be registered with the SEC and have at least \$300 million in verified assets under management as of 12/31/13, with no more than 75% of a firm’s assets being institutional. The *Financial Times* graded advisory firms that were considered for the list on six broad factors and calculated a numeric score for each advisor. Areas of consideration included AUM, AUM growth, years the firm



has been in existence, industry certifications of staff, SEC compliance record, and online accessibility. The list is independently determined by the *Financial Times*. The registered investment advisory firms are not charged a fee for consideration or selection.

###