

**Thomas J. Bartholomew of Bartholomew & Company
Honored in
Forbes' Best-in-State Wealth Advisors List**



Worcester, Massachusetts (February 20, 2019)—Bartholomew & Company, a financial planning and wealth management firm in Worcester, MA, today announces that its President, Thomas J. Bartholomew, AIF[®], has been named to *Forbes'* Best-in-State Wealth Advisors list for 2019. The list was published on Forbes.com, and a condensed listing is available in the current issue of the magazine.

Tom Bartholomew founded Bartholomew & Company in 1994, with more than two decades of experience in the investment and banking industries. Now in its 25th year, Bartholomew & Company's staff of 27 employees, including investment advisor representatives, certified financial planners, registered assistants and support staff, advises over \$2 billion in client assets with offices in Worcester, Chatham, and Bedford, MA.

Wayne Bloom, CEO of Commonwealth Financial Network[®], Bartholomew & Company's Registered Investment Adviser–broker/dealer, said, “Congratulations to Tom on this well-deserved recognition by *Forbes*. It is wonderful to see a client-centric, independent advisor who is devoted to providing expert financial planning represented on this list. We appreciate the value Tom brings to our industry and our community, and we remain committed to providing the infrastructure and support Bartholomew & Company's thriving practice demands.”

“It is an honor to be included on *Forbes'* list of top Massachusetts wealth advisors for the second year in a row, especially on the occasion of Bartholomew & Company's 25th year in business,” said Mr. Bartholomew. “I am privileged to work with wonderful clients and a dedicated team of employees, who have made our success possible.”

The 2019 ranking of the *Forbes'* Best-in-State Wealth Advisors¹ list was developed by SHOOK Research and is based on in-person and telephone due-diligence meetings to evaluate each advisor qualitatively and on a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria (including assets under management and revenue generated for their firms). Overall, 30,000 advisors were considered, and 3,500 (11.6 percent of candidates) were recognized. The full methodology² that *Forbes* developed in partnership with SHOOK Research is available [here](#).

¹*This recognition and the due-diligence process conducted are not indicative of the advisor's future performance. Your experience may vary. Winners are organized and ranked by state. Some states may have more advisors than others. You are encouraged to conduct your own research to determine if the advisor is right for you.*

²*Portfolio performance is not a criterion due to varying client objectives and lack of audited data. SHOOK does not receive a fee in exchange for rankings.*

#