



MBL Advisors

MBL Advisors Named to SmartAsset 100 Fastest Growing RIAs List

October 6, 2023 - MBL Advisors was named by SmartAsset as one of the 100 Fastest Growing RIAs out of over 15,000 SEC-Registered Investment Advisors (RIAs) in the industry. SmartAsset explained their data and methodology for the rankings. It determined the firms that were growing the fastest, identifying over 1,700 RIAs headquartered in the USA with no disciplinary disclosures, offer personal financial planning, and manage more than \$500 million in client assets. After removing those with recent mergers or acquisitions, firms were ranked based on changes in client account totals and assets under management (AUM) between 2020 and 2023. Client asset information was aggregated from public filings with the Securities and Exchange Commission (SEC). [The firm did not apply or pay for inclusion in the report.]

MBL Advisors is a boutique advisory firm specializing in Business Exit Planning, Wealth Management, Executive Benefits and Private Client Insurance Services. The firm launched MBL Wealth, LLC in January 2020 as an independent RIA, just prior to the outbreak of the Covid-19 pandemic. The firm has worked with dozens of successful entrepreneurs through the Business Exit Planning process, which has contributed to growth in the other three specialty services. “We are pleased with the warm reception the firm has received from prospective clients and their professional advisors interested in a wholistic approach to their financial lives. We have been fortunate to add a number of high quality teammates to grow our capabilities in all four areas of specialization. We are in the people business, and we emphasize long term relationships with our clients. The quality of our clients is a direct reflection of the caliber of the team,” said MBL Advisors Managing Partner, Luther Lockwood.

The firm will continue to focus resources to provide sophisticated Business Exit Planning services for entrepreneurs, corporate executives, and other professionals. “The momentum of organic growth that our firm has experienced has been contagious through a period of great uncertainty in the markets. The steady performance of our Wealth Management business through the turbulence has been a contributing factor,” added MBL Advisors Partner, Jonathan Dry.

2023 100 Fastest Growing RIAs, created by SmartAsset. Presented in September 2023 based on data from 2020-2023. Approx 1700 advisors were considered and 100 advisors were recognized. Advisors do not pay a fee to be considered or to hold out marketing materials. Not indicative of advisor’s future performance. Your experience may vary. Click here for more award information.

<https://smartadvisormatch.com/data/fastest-growing-rias-2023>



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