

# GRINKMEYER LEONARD FINANCIAL

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## FOR IMMEDIATE RELEASE

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## Valerie Leonard of Grinkmeyer Leonard Financial Honored in *Forbes'* Best-in-State Wealth Advisors List

**BIRMINGHAM, ALABAMA (January 23, 2020)**—Grinkmeyer Leonard Financial, a financial advisory services firm in Birmingham, Alabama, today announces that its co-founder, **Valerie R. Leonard**, AIF®, CPFA, has been named to ***Forbes'* Best-in-State Wealth Advisors** list for 2020. The list was published on [Forbes.com](https://www.forbes.com), and a condensed listing is available in the February issue of the magazine.

With more than 15 years of experience, Valerie's mission is to help people find better ways to manage their money and time. Her commitment as a leader in the financial industry and retirement community has earned her numerous recognitions throughout the United States. She specializes in 401(k) consulting for companies and in managing investment portfolios for and offering financial advice to high net worth individuals.

Wayne Bloom, CEO of Commonwealth Financial Network®, Grinkmeyer Leonard Financial's Registered Investment Adviser–broker/dealer, said, "Congratulations to Valerie on this well-deserved recognition by *Forbes*. Valerie is committed to providing expert guidance and essential support to her clients, and we are proud to provide Grinkmeyer Leonard Financial with the business solutions they need to power their practice."

"It is my sincerest delight to help Alabamians realize their financial dreams and manage their investments prudently," said Valerie. "I'm grateful to work with a caring team that undoubtedly plays an enormous part in serving our clients well. As we look toward the uncertain investment landscape in 2020 and beyond, we remain focused on empowering our clients to make wise choices about their money so they can be confident in their financial futures."

The 2020 ranking of the *Forbes'* Best-in-State Wealth Advisors<sup>1</sup> 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, 32,000 advisors were considered, and 4,000 (12.5 percent of candidates) were recognized. The full methodology<sup>2</sup> that Forbes developed in partnership with SHOOK Research is available [here](#).

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## About Grinkmeyer Leonard Financial

Grinkmeyer Leonard Financial has been providing individuals and organizations with financial guidance since 2007. Located at 2279 Valleydale Road, Suite 210, Birmingham, Alabama, 35244, the firm prides itself on offering clients independent, customized service solutions including full-service investment management, financial planning advice, and 401(k) services. For more information, please visit [www.grinkmeyerleonard.com](http://www.grinkmeyerleonard.com).

<sup>1</sup> 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.

<sup>2</sup> 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.

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