



GRINKMEYER
LEONARD FINANCIAL

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

BIRMINGHAM, ALABAMA (September 20, 2019)—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 Next-Gen Wealth Advisors** list for 2019. The list was published on Forbes.com.

With more than 15 years of experience, Valerie's mission is to help people find better ways to manage their money and time. She helps her clients successfully navigate growing their businesses, plan for retirement, and support themselves and their families. Her commitment as a leader in the financial industry and retirement community has earned her numerous recognitions throughout the United States.

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*. The future of the financial advice industry is bright and Valerie – and Grinkmeyer Leonard Financial – will undoubtedly continue to make a positive impact. We remain committed to providing the solutions the next generation of financial advisors need to power their journey and add time back into their day so they can focus on their clients."

"It's an honor to be recognized for doing something that I love," said Valerie. "It brings me so much joy to help people accomplish their financial dreams. There's no doubt in my mind that this recognition wouldn't be possible without our amazing team and our firm is committed to helping our clients achieve long-term success."

The 2019 ranking of the *Forbes'* Best-in-State Next-Gen Wealth Advisors¹ recognizes advisors born in 1980 or later with a minimum of four years of experience. Advisors were rated based on a proprietary algorithm of qualitative and quantitative criteria: assets under management, revenues generated for their firms, client retention, industry experience, credentials, and compliance records. SHOOK Research also employs an opinion-based weighting system that prioritizes its preferred "best practices," which include business models, activities, processes, and structure. Overall, 6,389 advisors were considered, and 1,495 (23 percent of candidates) were recognized. Click [here](#) for the full methodology² that *Forbes* developed in partnership with SHOOK Research.

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About Grinkmeyer Leonard Financial

Grinkmeyer Leonard Financial has been providing individuals and organizations with financial guidance since 2007. Located at 1950 Stonegate Drive, Suite 275, Birmingham, Alabama, 35242, 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.

¹This recognition and the due-diligence process conducted are not indicative of the advisor's future performance. Your experience may vary. You are encouraged to conduct your own research to determine if the advisor is right for you.

²Portfolio 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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