



GRINKMEYER LEONARD FINANCIAL

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

BIRMINGHAM, ALABAMA (February 21, 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 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.

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*. 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 Valerie brings to our industry and our community, and we remain committed to providing the infrastructure and support Grinkmeyer Leonard Financial's thriving practice demands."

"In a world where hardworking Alabamians are busy and don't have time to make sure their investments and financial planning strategies are as efficient as possible, I'm delighted to offer simple solutions and proactive service to help give them the confidence they need to get where they're going," said Valerie. "I am honored to be recognized by *Forbes* and am thankful for the opportunity to do what makes me happy every day when working with my clients."

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](#).

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Trent Grinkmeyer, Valerie Leonard, Jamie Kertis, and Caleb Bagwell are Registered Representatives and Investment Adviser Representatives with/and offer securities and advisory services through Commonwealth Financial Network, Member FINRA/SIPC, a Registered Investment Adviser. Fixed insurance products and services offered through Grinkmeyer Leonard Financial or CES Insurance Agency. This communication is not intended to replace the advice of a qualified tax advisor or attorney.

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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.

About Commonwealth Financial Network

Founded in 1979, Commonwealth Financial Network, member FINRA/SIPC, is the nation's largest privately held Registered Investment Adviser-independent broker/dealer, with headquarters in Waltham, Massachusetts, and San Diego, California. J.D. Power ranks Commonwealth "Highest in Independent Advisor Satisfaction Among Financial Investment Firms, Five Times in a Row." The firm supports approximately 1,800 independent financial advisors nationwide. For more information, please visit www.commonwealth.com.

¹This 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.

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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