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LEONARD FINANCIAL

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Valerie Leonard of Grinkmeyer Leonard Financial Honored in *Forbes'* Top 1,000 Next Generation Wealth Advisors List

BIRMINGHAM, ALABAMA (July 30, 2018)—Grinkmeyer Leonard Financial, a financial advisory firm in Birmingham, today announces that its Co-founder, **Valerie Leonard**, AIF®, CPFA, has been named to the *Forbes'* **Top 1,000 Next Generation Wealth Advisors** list for 2018. The list was published on Forbes.com.

Valerie's mission is to help people be the best they can be by making the most of their financial resources and time. Her commitment as a leader in the financial industry and retirement community has spanned nearly fifteen years and 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 being recognized by *Forbes*. This vibrant advisor brings new ideas and fresh perspectives to the industry and represents the next generation of independent advice for investors. We are proud to see her recognized, feel fortunate to have Grinkmeyer Leonard Financial as part of the Commonwealth community, and remain committed to serving this growing practice with the intuitive, integrated technology, tools, and resources that drive productivity and keep their business client forward."

Valerie issued a statement saying, "I'm blessed to have a platform to affect enduring change in the lives of so many people and I'm dedicated to being a positive thought-leader and dynamic influence in the financial services industry."

The 2018 ranking of *Forbes'* Top 1,000 Next Generation 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, 5,832 advisors were considered, and

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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, Grinkmeyer Leonard Benefits Group, or CES Insurance Agency. Grinkmeyer Leonard Benefits Group and their leadership consulting services are separate and unrelated to Commonwealth. This communication is not intended to replace the advice of a qualified tax advisor or attorney.

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1,000 (17 percent of candidates) were recognized. Click [here](#) for the full methodology² that *Forbes* developed in partnership with SHOOK Research.

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, AL 35242, and via phone at (205) 970.9088, the firm prides itself on crafting unique strategies for each client. For more information, please visit www.grinkmeyerleonard.com.

Valerie Leonard is a Registered Representative and Investment Adviser Representative with/and offers 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, Grinkmeyer Leonard Benefits Group, or CES Insurance Agency. Grinkmeyer Leonard Benefits Group and their leadership consulting services are separate and unrelated to Commonwealth.

¹*This 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.*

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.*

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