

COUNTY LINES
MAGAZINE

Celebrating 45 Years of Publishing!

2021

CHESTER
COUNTY

Stories



Behind every
great local
business,
there's a
great story.



KEY FINANCIAL, INC.

From ICU Nurse to Top Financial Advisor

Patti Brennan, CFP®

While she’s now recognized as one of the top financial advisors in the U.S., Patti Brennan’s path was unlike anyone else’s. After graduating from Georgetown University with a degree in Nursing, Patti worked in oncology and as an ICU nurse before channeling her compassion for others to work as a financial planner. Her intellectual capacity is as boundless as her energy, and in 1990 Patti founded Key Financial, Inc. while also raising four children.

Like most startup businesses, it started small—just Patti and a part-time employee who worked from a converted laundry room off the Brennan kitchen. But, with a combination of interpersonal skills and keen attention, after more than 30 years the firm now manages almost \$2 billion, with a retention rate of 99%—the envy of the industry.

Patti’s vision, her ability to solve problems and desire to serve each client is infectious and shared by every member of her team. Clients have security knowing this deep bench is unlike any others. Clients will be taken care of like family, for the rest of their lives ... and

beyond. Stewardship is a term they don’t take lightly.

Key Financial doesn’t just manage money. Through a culture rooted in the tenets of wisdom, perspective and commitment, the Key Financial team provides each client with a personalized financial plan with multiple scenarios, what if’s and stress tests. Their concierge service has resulted in a new standard for client experience and is being modeled by other firms throughout the U.S.

This culture paired with Patti’s unique ability to communicate complex financial concepts in understandable terms has garnered recognition by *Forbes*, *The Financial Times* and *Barron’s* as one of the Top Advisors in America year after year for over almost two decades.

It’s this culture that Patti describes as the “secret sauce” to the firm’s success. “This team of mine is not only the best in the industry, they’re a select group of individuals dedicated to the clients we serve. Our work isn’t about numbers. It’s about people and their futures, and this is why we treat every client like they’re the only client we have.”



1045 Andrew Drive, Suite A
West Chester; 610.429.9050; KeyFinancialInc.com



Disclosure:
Securities offered through Royal Alliance Associates, Inc., member FINRA/SIPC. Insurance services offered through Patricia Brennan are independent of Royal Alliance Associates, Inc. Advisory services offered through Key Financial, Inc., a registered investment advisor not affiliated with Royal Alliance Associates, Inc. The Barron’s Winner’s Circle Top 100 and the Barron’s Winner’s Circle Top 1200 are select groups of individuals who are screened on a number of different criteria. Among factors the survey takes into consideration are the overall size and success of practices, the quality of service provided to clients, adherence to high standards of industry regulatory compliance, and leadership in “best practices” of wealth management. Portfolio performance is not a factor. Please see www.barrons.com for more information. The Forbes ranking of America’s Top Wealth advisors, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors with a minimum of seven years of experience and weighing factors like revenue trends, assets under management, compliance records, industry experience and best practices learned through telephone and in-person interviews. There is no fee in exchange for rankings.





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ADORN GOODS

Jennifer Steiner, owner

Adorn Goods is a modern general store with a curated mix of unique home accessories and gifts. Located along Route 52 in quaint Centreville, DE, Adorn Goods is a convenient tax-free shopping destination for Pennsylvania and Delaware.

It's a fun experience for all types of shoppers ... stay for a while or plan to come back to fully experience all Adorn Goods has to offer ... from gourmet foods and pantry items like local honey and jams, craft cocktail mixers, Blackberry Farm products, Lady Fingers of Raleigh, Claudios Speciality Foods and top table linen and glass lines like Le Jaquard Francais, William Yeoward, Zafferano Glass, Sabre Flatware and Farmhouse Pottery.

Stop to check out the new custom screen doors and Trowbridge Gallery Framed photographs and art.

Adorn Goods, 5712 Kennett Pike, Wilmington, DE. AdornGoods.com; 302.575.96.57



MALVERN PREP

Rev. Donald F. Reilly, Head of School

This September, Rev. Donald F. Reilly, O.S.A., D.Min., will begin his fifth year and final academic year as the Head of School for Malvern Prep. During his tenure, Fr. Reilly has transformed the campus community in a multitude of ways—physically, academically and spiritually. Physically, the campus looks markedly different with the 2019 opening of the St. Augustine Center for Social Impact and the beautiful Quad in the heart of campus. He has also placed a focus on student-centered, project-based learning supported by an academy model of Faculty and Staff; addressed a need for diversity, inclusivity and equity; and kept young men safely engaged in the classroom, in their athletic pursuits and in their service to one another and the community during the pandemic. Fr. Reilly's dedication to the mission of Malvern Prep has preserved its place as an outstanding academic institution.

Malvern Preparatory School is an independent, Augustinian school for young men in grades 6 through 12. Since 1842, the School's tradition has been to prepare young men for college, for leadership and for life.

**Malvern Preparatory School
418 S. Warren Avenue, Malvern
MalvernPrep.org/LearnMore
484.595.1173**



HAZLEY BUILDERS

A leader in innovation and quality of custom homes, renovations and additions, Hazley Builders has earned a trusted reputation over the past 20+ years in Chester County. It's their strong belief that a well-crafted home is not only a direct reflection of their clients' vision, but that it's also a foundation for a life well lived. Every project is completed with integrity and unparalleled craftsmanship. They are a multi-generation company that consults, collaborates and creates with their clients to turn their dreams into reality.

Building a home, adding on to your home or renovating living spaces can be a frustrating experience that potentially takes more time than planned and too often goes over budget. At Hazley Builders, compassion and care are demonstrated throughout the design and build process. They provide a personalized construction and development plan tailored to each client's project. This provides the homeowners with peace of mind that the project will be on time and on budget—all while exceeding the dreams and visions for each client's home.

Hazley Builders, 829 Lincoln Avenue., West Chester, HazleyBuilders.com; 610.696.6264



BENCHMARK FEDERAL CREDIT UNION

WE NEVER GAVE UP ON GIVING

"During COVID-19 shutdowns, while some businesses cut costs by withdrawing support for outreach programs in our community, that was never a consideration for us," says Daniel J. Machon, Jr., President and CEO of Benchmark Federal Credit Union.

Serving Chester County for more than 80 years, Benchmark FCU supports more than 20 community events and organizations annually. Corporate sponsorships during the pandemic included the Chester County Single Mothers' Conference, Chester County Futures, Friends Association, WCU Athletics and more.

When the Benchmark Twilight Cycling Classic was cancelled due to the pandemic, Benchmark continued to support the Greater West Chester Chamber of

Commerce by covering business support programs and \$10,000 in membership dues for 38 Chester County businesses and nonprofits. In addition, more teachers and students enjoyed Benchmark's free, award-winning, virtual financial literacy curriculum in 2020–2021 than in the past 5 years combined. Benchmark FCU also offered up to \$1 million in interest-free loans for Chester County businesses.

"We're the only federal credit union to serve Chester County exclusively, so our members are incredibly loyal to us and the community organizations we serve," says Machon.

In recognition of Benchmark's commitment to the community, the Greater West Chester Chamber named Benchmark FCU the *2020 Business of the Year*.

**Benchmark Federal Credit Union
Serving Chester County Exclusively
BenchmarkFCU.org
610.429.1600**



MALVERN BANK

Malvern Bank is a niche community bank devoted to equestrian lending and business services that provide financial solutions tailored to equestrians. Whether you're an amateur or professional competitor, trainer or simply a horse lover, Malvern Equestrian has the resources and expertise to help you follow your dreams.

Malvern Bank's Equestrian Team—uniquely consisting of equestrians who have performed at all levels—is the brainchild of CEO & President Tony Weagley, the proud owner of decorated American quarter horses. Hillary Dobbs is a former international Grand Prix rider who represented the U.S. in team competition, and Rachel Heist grew up competing on the Northeast hunter/jumper circuit and collegiate hunt seat team. This qualified team understands the equestrian industry and is passionate about facilitating your needs.

As a Malvern Bank Equestrian client, you have access to a variety of financial solutions designed to manage cash flow and increase interest earnings. The team will match you with the best options when buying a farm, financing your next prospect, or purchasing new equipment.

Malvern Bank proudly sponsors equestrian events including the Devon Horse Show, Brandywine Polo, Far Hills Race, Princeton Show Jumping, Silver Oak Jumper Tournament, and the Pennsylvania National Horse Show.

Malvern Bank
650 Lancaster Ave., Berwyn
610.251.9585
Learn more at MyMalvernBank.com



Hillary Dobbs, AVP, Private Client Officer, Florida



Rachel Heist, AVP, Personal Banker, Main Line