

COUNTY LINES MAGAZINE

Celebrating 46 Years of Publishing!

2022 CHESTER COUNTY *Stories*



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



FROM ICU NURSE TO TOP FINANCIAL ADVISOR

Patti Brennan, CFP®

While she is now recognized as one of the top advisors in America, 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 was small – just Patti and a part time employee that worked out of a converted laundry room just off the kitchen. A combination of interpersonal skills and keen attention to detail has helped Key Financial grow throughout the past 30 years to a firm that manages just under \$2 billion, with a high retention rate.

Patti's vision, her ability to solve problems and the desire to serve each client is infectious and shared by every member of her team. Clients like knowing this deep bench is unlike any others, and they 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 approach to concierge service is the direct result of goals driven by high standards of excellence. This culture paired with Patti's unique ability to communicate complex financial concepts through 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. "In my opinion, this team of mine is not only the best in the industry, they are a select group of individuals dedicated to the clients they 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."

Key Financial Inc.
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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 Hall of Fame 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. *Forbes* "Best In State Wealth Advisors 2022" list (Feb. 2022). The ranking for this list by SHOOK Research is based on due diligence meetings to evaluate each advisor qualitatively, a major component of 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. *Forbes* is a trademark of *Forbes Media LLC*. All rights reserved. Rankings and recognition from *Forbes*/SHOOK Research are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher level of performance results and such rankings should not be construed as an endorsement of the advisor. Third party rankings and recognitions are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation.



HER FRIENDS FOR LIFE AWAIT AT NOTRE DAME!

With state-of-the-art centers for STEM and Arts education, a world-class faculty, and exciting global learning opportunities, the Academy of Notre Dame inspires young women to take their place in the world as confident, compassionate leaders.

New in 2022: Notre Dame launched ND Cares, a school-wide initiative focused on the well-being, social-emotional growth, and mental health of every student. Through ND Cares, students will receive the skills and resources needed to develop health-seeking behaviors and to recognize when their classmates show signs of stress,

anxiety, and more. After kicking off with a Parent Education Night featuring Dr. Kenneth Ginsburg, Co-Founder and Director of Programs at Center for Parent and Teen Communication, Notre Dame has also partnered with The JED Foundation and The Social Institute to develop Upper and Middle School programming to assist students in strengthening their emotional health.

Attend Notre Dame's **Open House** on **Sunday, October 2** or tour ND's bucolic 39-acre Villanova campus during a Walk-in Wednesday (October 5 or November 2) to

discover the true sisterhood at Notre Dame, where every student is empowered to pursue her passion, find her voice, and discover her limitless potential.

The Academy of Notre Dame is an independent, college-preparatory, Catholic school for girls and young women in grades 6-12.

ACADEMY of NOTRE DAME de NAMUR
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MALVERN PREPARATORY SCHOOL

This July, Mr. Patrick Sillup assumed the role of Malvern Preparatory School's 15th Head of School. Over the last 11 years, Patrick served in a variety of teaching and administrative roles at Malvern, most recently serving as Assistant Head of School for Academics. He has proven himself to be a dedicated and innovative leader – having led the development of a new Academic Department (Interdisciplinary Studies), created opportunities for students to learn at local universities, and designed the Summer Institute (Thagaste) – a professional development curriculum for faculty. Sillup was also instrumental in ensuring that the St. Augustine Center for Social Impact was more than just a new building when it was completed in 2019, but also a catalyst for collaborative and creative thinking to emerge as

students seek to solve problems for the common good. Over the next several years, Sillup will oversee major renovations to the campus' physical plant with the goal of providing an environment that embraces the idea that learning happens wherever the learner is in the 21st century.

Malvern Preparatory School is an independent, Augustinian school for young men in grades six through twelve. 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, PA 19355
malvernprep.org/learnmore • 484-595-1173



WINDLE DESIGN & CONSTRUCTION

Ed, Seth, and Luke Windle

Windle Design and Construction has quickly become one of the top-rated Design/Build firms in the Chester Country area. As a family owned and operated business, we are passionate about redefining people's opinion of the construction industry by being honest, trustworthy and reliable. From initial conception, through intentional designs and seamless installations, Windle D&C guides our clients through every step of their project. Our design team's attentiveness to our clients vision and highly skilled construction team is a large reason as to why we have become such a highly regarded team in this area.

We consider it a great honor to hand the keys back over to our clients, knowing their new space will be the beginning of new memories for years to come.

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