

William Keen, CRPC[®] and Matthew Wilson, CFP[®] AMONG “BEST OF BEST” FINANCIAL ADVISORS ATTENDING BARRON’S TOP INDEPENDENT ADVISORS SUMMIT

Exclusive Conference Hosts Elite Gathering of Nation’s Pre-eminent Financial Advisors and Industry Decision Makers



Scottsdale (March 23, 2015)—William Keen, CRPC[®], Founder and CEO of Keen Wealth Advisors and Matthew Wilson, CFP[®], Managing Director attended the seventh-annual *Barron’s Top Independent Advisors Summit*, hosted by *Barron’s* magazine to promote best practices in the industry and the

value of advice to the investing public. The invitation-only conference was held at the Fairmont Princess Hotel March 23 - 25 in Scottsdale, AZ.

Many of the Top 100 Independent Financial Advisors in the U.S., as ranked and published in *Barron’s* August 23, 2014 issue, were in attendance. This annual ranking is the basis for the Top Independent Advisor’s Summit and the advisors are chosen based on the volume of assets overseen by the advisors and their teams and the quality of the advisors’ practices. The top 100 Independent Advisors are comprised of Registered Independent Advisors and Advisors from Independent Broker Dealers. A total of 500 elite advisors took part in the event.

“We are honored to be a part of the Summit as it brings together key leaders and top decision makers from around the country and is recognized by the financial advisor community as the industry’s leading event. The ideas shared and discussions here continue to equip attendees to provide the best investment and financial advice to clients. The theme here is that we all can always be learning and improving and staying out in front of the issues – something that is vital given the challenging economic and market conditions of today.” Keen said.

This exclusive conference is designed to promote best practices and generate new ideas across the industry. Attendees conducted workshops led by the Top 100 Independent Financial Advisors that explored current issues of importance ranging from portfolio construction and management to investing in overseas markets, managing risk, technology applications and client relations.

“Investors today are looking to generate income while protecting their portfolios against downside risk,” said Ed Finn, editor and president of Barron’s. “These top-tier advisors have clients that depend on them to meet critical financial goals for themselves, their families, their businesses or their institutional funds. Advisors will leave this conference better equipped to do just that.”

Keen and Wilson were among the 500 financial advisors who were either selected by Barron’s or their affiliated firm to participate in the event. Associated participating firms included: *Advisor Group, Ameriprise Financial Services, Charles Schwab, Commonwealth, Fidelity Investments, Interactive Brokers, LPL Financial Services, Pershing, Raymond James, TD Ameritrade Institutional, and Wells Fargo Financial Network.*

For more information about Barron’s conferences, please go to

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About Barron’s

Barron’s (www.barrons.com) is America’s premier financial magazine, renowned for its market-moving stories. Published by Dow Jones & Company since 1921, it reaches an influential audience of senior corporate decision makers, institutional investors, individual investors and financial professionals. With new content available every week in print and every business day online, Barron’s provides readers with a comprehensive review of the market’s recent activity, coupled with in-depth, sophisticated reports on what’s likely to happen in the market in the days and weeks to come. As a result, Barron’s is the financial information source these powerful people rely on for market information, ideas and insights they can use to increase their professional success and enhance their personal, financial well-being.

The “Barron’s Top 100 Independent Financial Advisors” is a select group 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.

Attendees of the Barron’s Conference were comprised of the independent advisors listed in “Top 100 Independent Financial Advisors”, (August 23, 2014) as well as financial advisors who were chosen by Barron’s or their associated firms.