

ICU to CEO: Lessons in Leadership, Grit and Growth



Patti Brennan, CFP®, CFS®, CTS™, CEPA®, CEO of Key Financial, Inc.

From ICU nurse to nationally-ranked financial advisor, Amazon best-selling author, and host of "The Patti Brennan Show" podcast—Patti Brennan's career path has been anything but conventional. Over 30 years ago, Patti broke the ranks and created a unique financial advisory model—one that integrates wisdom and compassion with deep thinking and proactive service. What started as a bold vision in her laundry room has transformed into something that's caught the attention of many throughout the industry.

As a Certified Financial Planner (CFP®), Certified Fund Specialist (CFS®), Certified Tax Specialist (CTS™), and Certified Exit Planning Advisor (CEPA®) with a Georgetown University education, Patti brings more than just technical expertise to the table. She sees the impact of small details in the big picture and translates complex financial concepts into simple, meaningful terms.

At Key Financial, Patti and her team use cutting-edge technology to help organize, clarify, and simplify their clients' financial lives. She believes wealth management represents the outcome of a well-executed financial plan that's constantly monitored and adjusted.

Patti's good judgment has been in high demand, and she has served boards throughout the community, including YMCA of Greater Brandywine, Connect Thru Cancer, and Penn Medicine Chester County Hospital. Her recognition as Ernst & Young's 2023 Entrepreneur of the Year and Forbes rankings (#1 in Pennsylvania and #14 nationally among women advisors in 2025), and Barron's Hall of Fame (2019) reflect Patti and her team's ongoing commitment to excellence.

Balancing life as a wife, mother of four (grandmother of three), and CEO has taught Patti invaluable lessons about finance and psychology. Her husband Ed is also an entrepreneur, making their dinner table conversations a blend of business challenges and family adventures.

In her Amazon best-seller "Am I Going to Be Okay? (And is 'Okay' Enough?)" Patti shares insights from her journey, offering actionable financial advice anyone can relate to—regardless of net worth.

On Patti's pegboard, you would see John Ruskin's quote: "When love and skill come together, expect a masterpiece." Patti brings this mindset to everything she does.

Key Achievements & Recognitions

- Built Key Financial from startup to managing nearly \$3 billion in client assets
- Inducted into Barron's Hall of Fame (2019)
- Ernst & Young Entrepreneur of the Year Award Winner (2023)
- Named Forbes #1 Woman Wealth Advisor in Pennsylvania (2023-2025) and #14 among Forbes Top Women Wealth Advisors nationwide (2025)
- Ranked Barron's #37 Top 100 Independent Advisors (2025) and #16 Top 100 Women Financial Advisors (2025)
- Amazon Best-Selling Author: "Am I Going to Be Okay? (And is 'Okay' Enough?)"

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