Key Financial, Inc.
Wealth Management with Wisdom & Care

keyfinancialinc.com
610-429-9050
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A Relationship That Extends Beyond Investments

ABOUT YOU:

You worked hard for what you've built, and you want to protect it. But there are so many confusing signals out there that it's hard to know where to turn, and you don't want to spend your life second-guessing every decision. What you want is someone you can trust: credentialed professionals who listen first, tell you the truth, and look out for you at every step. Not someone who promises the moon; someone reliable, realistic, and diligent.
*That's who we've been since 1990, and it's why 99% of our clients stay.**

$2.8B	1990	35+	99%
Assets Under Management & Advisement*	Founded	Person Team	Client Retention*

Includes RAUM and other assets under advisement as of 12/31/25; Retention is as of 12/31/25

AWARDS & RECOGNITION

Patti Brennan is a member of the Barron's Hall of Fame, an EY Entrepreneur of the Year (2023), and was recognized by Forbes as #1 Best-in-State Wealth Advisors Pennsylvania – East PA (High Net Worth). Behind her is a team of 9 CFP® professionals and credentialed specialists in investment analysis, business exit planning, tax strategy, and estate settlement.

Barron's Hall of Fame Advisor | EY Entrepreneur Of The Year® 2023 Award Winner | Barron's Advisor Top 100 Independent Advisors 2025 | Forbes 2026 America's Top 250 Wealth Advisors Shook Research | Forbes 2026 Best-in-State Wealth Advisors Shook Research

Additional recognition includes Forbes Top 250 Wealth Advisors, Forbes Top Women Wealth Advisors, Barron's Top 100 Independent Advisors, Barron's Top 100 Women Financial Advisors, and Barron's Top 1,500 Financial Advisors. Full award details and methodology at keyfinancialinc.com/disclosures.

Every Part of Your Financial Life, Coordinated.

WEALTH MANAGEMENT FROM EVERY ANGLE

A KFI relationship brings together one team across everything that shapes your financial life, from investment strategy to the practical realities of a long, well-lived retirement.

CAPABILITIES & SERVICES

- Financial Planning & Portfolio Management
- Cash Flow Planning
- Income Tax Planning
- Asset Allocation & Diversification
- Retirement Income Planning
- Wills, Living Trusts & Estate Planning
- Bucket List Planning
- Insurance Planning

VITALITY PLANNING: PLANNING SO YOU CAN TRULY THRIVE

Most financial plans stop at the portfolio. Vitality Planning addresses what comes next: Navigating healthcare and Medicare, preparing for caregiving and aging in place, protecting against elder fraud, and keeping essential documents organized and accessible when your family needs them. It's built into every KFI client relationship, with vetted specialists in each area, because a plan for your money should include a plan for your life.

OUR PROCESS

A Comprehensive, Six-Step Framework

1 Discovery & Your Story
In-depth conversations to understand your values, priorities, and life goals, beyond your finances.

2 Uncovering the Unknown
A thorough review of assets, cash flow, insurance, taxes, estate documents, and investments.

3 Strategic Planning & Design
A coordinated plan tailored to your goals, timeline, and risk tolerance.

4 Coordinated Implementation
With your approval, we put the plan into action and coordinate with your other professionals.

5 Ongoing Management
We monitor your plan through a secure private portal and adjust as markets, taxes, and life change.

6 Review & Optimization
Scheduled reviews keep your strategy aligned with evolving goals and circumstances.

Is Key Financial Right for You?

The best way to find out is a conversation.
We'll listen first.

Book Your Complimentary Consultation

Call: 610-429-9050

Disclosures

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