

## Treybourne Wealth Ranked Among Top 100 Firms in U.S.

GREENWOOD, IN – Editors from the financial website CNBC.com have named Treybourne Wealth Planners among the Top 100 Fee-Only Wealth Management Firms in the United States.

***“While we most value the trust we have with our clients, it is certainly nice to be recognized nationally,”*** said Treybourne founding partner Marty Armbruster, CPA/PFS, CFP®.

Treybourne Wealth, located in Greenwood, Indiana, was founded in 1985 as part of the accounting firm Sherman & Armbruster. A fee-only registered investment advisor (RIA), Treybourne Wealth offers personalized wealth management, investment management and retirement planning services to clients across 12 states.

The CNBC.com editorial team, along with Meridian-IQ, ranked the fee-only wealth management firms across the country on several factors, including:

- Assets under management.
- Having staff with professional designations, such as a CFP® or CFA.
- Working with third-party professionals, such as attorneys or CPAs.
- Average account size.
- Growth of assets.
- Number of advisory clients.
- Providing advice on insurance solutions.
- Absence of complaints, actions, or disclosures from financial regulators and state insurance commissioners.

Treybourne Wealth was ranked 92 by CNBC.com, which published the list for the second year. ***“Our philosophy is rooted in a traditional investment theory that begins with gaining a personal understanding of each client. We listen closely to their needs, fears, and goals. It is perhaps the most important step of the wealth-planning process,”*** said Stephanie Willison CPA/PFS, CFP®, Treybourne’s other partner.

Treybourne Wealth has received other honors for the firm’s work. Armbruster was admitted in 2014 to the All-Star Financial Group, a national association of distinguished Certified Public Accountants who specialize in financial, tax and investment planning. Armbruster also has been named a Five Star Best in Client Satisfaction Wealth Manager every year since 2009.

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Source: [CNBC Charts Top 100 Firms](#)