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FOR IMMEDIATE RELEASE

**HEFREN-TILLOTSON EXECUTIVE VICE PRESIDENT NAMED  
TO *FORBES* MAGAZINE BEST PENNSYLVANIA FINANCIAL ADVISORS LIST**

**PITTSBURGH** – Hefren-Tillotson, Inc., one of Western Pennsylvania’s largest investment advisory and financial planning firms, has announced that Executive Vice President Kurt Carlson has been named to the *Forbes* Magazine Best-In-State Wealth Advisors list.

The 2020 ranking of the *Forbes*’ Best-in-State Wealth Advisors was developed by SHOOK Research and is based on in-person and telephone due-diligence meetings to evaluate each advisor qualitatively and on 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).

Overall, 30,000 advisors were considered, and 3,500 (11.6 percent of candidates) were recognized.

“We congratulate Kurt on this well-deserved recognition by *Forbes*,” said Kim Fleming, Hefren-Tillotson Chief Executive Officer. “It is wonderful to see a client-centric, independent wealth advisor in the Pittsburgh-area who is devoted to providing expert financial planning represented on this list.

“We appreciate the value Kurt brings to our industry and our community, and we remain committed to providing the infrastructure and support Hefren-Tillotson’s thriving business demands.”

Carlson joined Hefren-Tillotson in 1990, and as part of The Carlson Group he primarily consults with individuals in developing comprehensive financial plans and strategies to achieve their goals in the areas of investments, insurance, retirement, estate, and tax planning.

He is an active member of the firm's Asset Management Group, helping to guide and formulate overall investment strategies for fee-based clients. Carlson is a CFP® practitioner, a Chartered Financial Analyst charter holder (CFA®) and an Accredited Investment Fiduciary Auditor (AIFA®). He also serves as co-host of "Your Money and You" on KDKA Radio.

### **About Hefren-Tillotson**

Hefren-Tillotson Inc., is a leading diversified financial services firm providing investment and retirement plan management and comprehensive, financial planning through MASTERPLAN for individuals and businesses. The firm's wealth management services are administered by Certified Financial Planner (CFP) professionals, Chartered Financial Analyst (CFA) Charter holders, attorneys, Chartered Life Underwriters, and CPA/PFS's. Hefren-Tillotson offers corporate services including 401 (k) retirement planning, executive financial counseling, fiduciary reviews and workplace financial planning seminars. Founded in 1948, the firm is headquartered in Pittsburgh and has offices located in Pittsburgh, Butler, Greensburg, North Hills, and South Hills.

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