



CONTACTS: Larry Sebbens  
Corporate Communications  
v: 412-633-1518  
[larry.sebbens@hefren.com](mailto:larry.sebbens@hefren.com)

Dick Roberts  
Roberts Communications USA  
v: 412-681-1600  
[droberts@robcomusa.com](mailto:droberts@robcomusa.com)

FOR IMMEDIATE RELEASE  
July 22, 2019

**HEFREN-TILLOTSON EXECUTIVE VICE PRESIDENT NAMED TO  
*FORBES* MAGAZINE BEST-IN-STATE WEALTH ADVISORS**

**PITTSBURGH** – *Forbes* Magazine, in partnership with SHOOK Research, has released the list of Best-In-State Wealth Advisors, a ranking of more than 3,400 of the nation’s top finance minds, broken down state-by-state.

Representing Pennsylvania is Kurt Carlson, Executive Vice President of Hefren-Tillotson, Inc., one of Western Pennsylvania’s largest investment advisory and financial planning firms.

With nearly 30,000 nominations, nominees and honorees for the Best-In-State Wealth Advisors are judged based on an algorithm of qualitative criteria, gleaned through telephone and in-person due diligence interviews, as well as quantitative data. Advisors must have a minimum of seven years experience to qualify, with the algorithm weighing additional considerations such as revenue trends, assets under management, compliance records, and industry experience.

“Kurt Carlson is an outstanding financial advisor who is completely dedicated to providing his clients with exceptional wealth management services,” said Kimberly Tillotson Fleming, Hefren-Tillotson’s Chief Executive Officer. “We recognize the dedication Kurt and his team show to their clients, and also recognize his contributions as a member of the company’s Board of Directors.

We could not be more proud to have him as a part of our team.”

Carlson joined Hefren-Tillotson in 1990 and is part of the firm's Asset Management Group, helping to guide and formulate overall investment strategies for the firm's 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.

"The majority of wealth advisors are naturally located in areas where there is a higher concentration of wealth, such as New York City or Silicon Valley," said R.J. Shook, president of SHOOK Research. "While these individuals are undoubtedly talented, there are world-class advisors in every market, big or small, and it's our objective to recognize them."

### **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.

- # # # -