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FOR IMMEDIATE RELEASE

HEFREN-TILLOTSON'S KURT CARLSON NAMED IN *FORBES* MAGAZINE AS A 2021 TOP WEALTH ADVISOR IN PENNSYLVANIA

PITTSBURGH — Kurt Carlson of Hefren-Tillotson Wealth Management was recently ranked No. 14 in Pennsylvania in the 2021 Best-In-State Wealth Advisors list published by *Forbes* magazine.

According to *Forbes*, the annual list spotlights the nation's top-performing advisors, with evaluation based on a methodology developed by SHOOK Research. Advisors are also evaluated based on personal interviews, industry experience and revenue trends, among other criteria.

"This recognition is a testament to Kurt's commitment to providing personalized plans that help clients reach their long-term financial goals," said Kim Tillotson Fleming, Hefren-Tillotson Chief Executive Officer. "With increasing demand for advice from a trusted financial advisor, we applaud Kurt for raising the bar in our industry and demonstrating the value of building lasting relationships with clients.

"On behalf of Hefren-Tillotson, I thank him for the excellent care he provides to his clients and for being a mentor to so many of our young advisors."

Carlson, based in the company's North Hills office, is an Executive Vice President with Hefren-Tillotson and he joined the firm in 1990. As part of The Carlson Group, Carlson 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.

Carlson is also active on Hefren-Tillotson's Asset Management Advisory Board, 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®).

Carlson was also named to Barron's Top Advisor Rankings in Pennsylvania for 2015, 2016, 2017, 2018, 2019, and 2020. He was also named Forbes Best-In-State Wealth Advisors for 2019 and 2020. He can be heard on the weekly radio show, "Your Money and You," airing live every Sunday morning from 9:00am to 11:00am on KDKA AM 1020 and FM 100.1 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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