

FOR IMMEDIATE RELEASE

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WEALTH MANAGEMENT NAMED AS ONE OF THE TOP FIRMS BY ASSETS UNDER MANAGEMENT BY NATIONAL MAGAZINE

BerganKDV Wealth Management has been ranked as one of the Top Firms by Assets Under Management (AUM) from *Accounting Today Magazine*. The ranking is based on \$1,158,305,219 in AUM which qualified the firm for The Billion Dollar Club for 2020.

Accounting Today has been compiling the list of leading U.S. wealth management firms by assets under management for the past 14 years. The magazine's editors gather annual data on the amount of assets under management held by CPA financial planners, from the planners themselves, broker-dealers and independent market research services to then rank the firms.

BerganKDV Wealth Management, LLC is led by Matt Cosgriff, CFP® and has 23 team members working in the firm's Minnesota, Iowa and Nebraska locations. The team includes numerous Certified Financial Planners, that work closely with a broad array of other experts, including approximately 200 Certified Public Accountants, Charter Financial Analysts, among other experts across the firm to assist clients with their wealth management needs.

The team's philosophy is to find and customize the strategies that work best for individual clients, based on a detailed understanding of their needs and other factors. One aspect that makes BerganKDV Wealth Management different from many firms is that because the wealth management division grew out of a CPA firm, the solutions seamlessly combine sound investment principles with tax-advantaged investment strategies.

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About BerganKDV: BerganKDV is a leading professional services firm with a contagious culture; where growth is fostered and making a difference means something. Our values drive our decisions, and our passion is empowering people and creating a wow experience for our clients.

Powered by people who do business the Midwest way, BerganKDV delivers comprehensive business, financial and technology solutions including business planning and consulting, tax, assurance and accounting, technology, workforce management, wealth management and turnaround management services.

Investment advisory services and fee-based planning offered through BerganKDV Wealth Management, an SEC Registered Investment Advisor.

