**BAIRD’s COLEMAN RECOGNIZED AS TOP WOMAN ADVISOR BY FORBES**

**APRIL 20, 2020 – Abilene, Texas**

“Cathie’s inclusion on this prestigious national list solidifies her position among the very best

financial advisors in the industry and in the country,” said Mike Schroeder, President of Baird’s

Private Wealth Management group. “She excels at delivering the best financial advice and

service to her clients, and couldn’t be more deserving of this recognition.”

Financial advisors are selected for the FORBES ‘America’s Top Women Advisors’ list based on an

algorithm of qualitative and quantitative criteria, including in-person interviews, industry

experience, compliance records, revenue produced and assets under management.

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It is my distinct pleasure to inform you that **Cathie G. Coleman, CFP®** has been recognized on the **2020 FORBES America’s Top 1,000 Women Advisors** listing.. This year's Top Women Wealth Advisors list spotlights top advisors across the country who were nominated by their firms—and then researched, interviewed and assigned a ranking within their respective states. There are sixteen women being recognized at Baird, and Cathie is the sole representative from Texas.

Cathie is a Managing Director, Financial Advisor with **The Galbraith Group**, which is comprised of team members **Gerald A. Galbraith, Managing Director; Darby DePauw, Associate Financial Advisor; and Mary Flores, Client Assistant.** The multi-generational wealth management team is dedicated to helping individuals, families and small business build, manage and transition their wealth.

Cathie's commitment to Baird's client-first philosophy, teamwork and service earned her this best-in-class recognition. Please join us in congratulating Cathie and the entire team on this tremendous achievement.

Sincerely,



Mark Stevanovic

*Managing Director*

*Market Director*

**Cathie G. Coleman, CFP® at Baird Private Wealth Management**

**WAS NAMED TO “TOP WEALTH ADVISOR MOMS” LIST BY *WORKING MOTHER* AND SHOOK RESEARCH**

**500 MOTHERS WHO DOMINATE THE**

**WEALTH-MANAGEMENT FIELD**

New York, NY (September 29, 2020) — **Cathie G. Coleman, CFP®** was selected as one of the Advisors on the fourth-annual “[Top Wealth Advisor Moms](https://bit.ly/3mMdC1n)” list, released today by *Working Mother* magazine and SHOOK Research. This year’s list has expanded to feature the top 500 mothers working in wealth management today, and is a ranking that measures the best practices of each advisor learned through telephone and in-person interviews, and considers such factors as their service models, investing process, revenue generated for their firms, client retention, and assets under management.

"We are proud to have **Cathie G. Coleman, CFP® on** our team as we continue to grow and evolve our Private Wealth Management business to best serve our clients' needs," said Mike Schroeder, President of Baird's Private Wealth Management group. "This recognition also continues to affirm the firm's recent honor of being named one of the 2020 Best Workplaces for Women by Fortune and Great Place to Work. Our ongoing commitment to being a great place to work where all of our associates can thrive enables us to attract and retain talented women who provide the best service and advice to our clients."

“We are proud to recognize these smart, ambitious working mothers who are committed to helping their clients economically recover from COVID-19 by advising them on life-defining personal financial matters,” says Subha V. Barry, president of Working Mother Media. “By choosing the path of a wealth advisor, they are able to dedicate themselves to fulfilling careers all while raising a family.”

“During good times or difficult times like the current crisis we’re enduring, families depend on trusted sources for guidance,” says Liz Shook, co-founder and COO, SHOOK Research. “These Working Mother Wealth Advisors represent the best of the best, and epitomize the leadership families want and deserve.”

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METHODOLOGY  
SHOOK Research considered women advisors with a child 21 or younger still living at home. Ranking algorithm is based on qualitative measures derived from telephone and in-person interviews and surveys: service models, investing process, client retention, industry experience, review of compliance records, firm nominations, etc.; and quantitative criteria, such as assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Neither SHOOK nor Working Mother Media receives compensation from the advisors or their firms in exchange for placement on a ranking. Rankings are based on the opinions of SHOOK Research LLC and not indicative of future performance or representative of any one client’s experience; the firm’s research and rankings provide opinions for how to choose the right financial advisor. Remember, past performance is not an indication of future results. For more information, see [shookresearch.com.](http://shookresearch.com/)

ABOUT WORKING MOTHER MEDIA  
Working Mother Media (WMM), a division of Bonnier Corp., publishes *Working Mother* magazine and its companion website, workingmother.com. [The Working Mother Research Institute](http://workingmother.com/wmri), the [National Association for Female Executives](http://nafe.com), [Diversity Best Practices](http://diversitybestpractices.com) and [Culture@Work](http://www.cultureatwork.com) are also units within WMM. WMM’s mission is to serve as a champion of culture change, and *Working Mother* magazine is the only national magazine for career-committed mothers. Follow us on [Facebook](https://www.facebook.com/working.mother/), [Twitter](https://twitter.com/_workingmother_?lang=en), [LinkedIn](https://www.linkedin.com/company/working-mother-media/) and [Pinterest](https://www.pinterest.com/wmmagazine/).

ABOUT SHOOK RESEARCH  
As America’s only wealth advisor research organization, SHOOK Research recognizes the most outstanding wealth advisors in the business. The firm’s host of quantitative and qualitative deep due-diligence measures includes telephone and in-person meetings. The firm shares its best-practices research through conferences and speaking engagements. SHOOK regularly gives back and has raised more than $300 million for the world of philanthropy. For more information, see [shookresearch.com](http://shookresearch.com/).

ABOUT BAIRD

Putting clients first since 1919, Baird is an employee-owned, international wealth management, asset management, investment banking/capital markets, and private equity firm with offices in the United States, Europe and Asia. Baird has approximately 4,600 associates serving the needs of individual, corporate, institutional and municipal clients and more than $305 billion in client assets as of December 31, 2019. Committed to being a great workplace, Baird ranked No. 13 on the 2020 Fortune 100 Best Companies to Work For® list. Baird is the marketing name of Baird Financial Group. Baird’s principal operating subsidiaries are Robert W. Baird & Co. Incorporated in the United States and Robert W. Baird Group Ltd. in Europe. Baird also has an operating subsidiary in Asia supporting Baird’s investment banking and private equity operations. For more information, please visit Baird’s website at [www.rwbaird.com](http://www.rwbaird.com).