BARRETT ASSET MANAGEMENT PARTNERS RECOGNIZED BY CRAIN’S NEW YORK BUSINESS AS NOTABLE WOMEN IN FINANCIAL ADVICE

Christina Bater, CFP®, RICP® and Amy Kong, CFA selected for inaugural report of leading women executives in financial services

December 8, 2020—New York, NY—Barrett Asset Management, LLC, is pleased to announce that Christina Bater, CFP®, RICP® and Amy Kong, CFA have been recognized as leading women executives in financial services by Crain's New York Business’ Notable Women in Financial Advice. The honor recognizes individuals for their dedication to excellence in the financial services industry and their significant professional, civic, and philanthropic contributions to their industry, community and broader society.

Crain's introduced this award for the first time in 2020 to recognize a cross-section of notable women in the financial advice industry in the New York metropolitan area. Crain's highlighted that women account for just 20% of financial advisors in the U.S.

Peter H. Shriver, CEO, Barrett Asset Management, said, “As a firm, we are always honored when any of our partners are recognized for their commitment to serving our clients at an exemplary level. This most recent recognition is no exception and clearly reflects the confidence clients have placed in our team and firm.”

Chris Bater has been a part of the Barrett family for more than 30 years, working closely with multi-generational family relationships and high-net-worth clients to manage a holistic wealth management approach, integrating the firm’s core investment advisory offerings with financial planning and wealth management solutions. Describing herself as a dream facilitator and “financial sherpa”, Chris helps her clients navigate the ups and downs of life while pursuing their goals and aspirations.

Amy Kong, who joined Barrett Asset Management in early 2019, serves as the firm’s Chief Investment Officer and leads the Investment Committee, as well as manages private client assets and the firm’s flagship mutual fund. “In barely a year with Barrett, Amy has already made her mark,” said Robert Milnamow, President, of Barrett Asset Management. “Her creative approach to generating investment ideas and implementing them through a disciplined process delivers incredible benefit to our clients.” Marking her 20th year in the financial services industry, Amy is a thought leader who contributes regularly to media sources that include Reuters, The Wall Street Journal and Bloomberg Business, among others.

The team at Barrett Asset Management works closely with high-net-worth individuals, families and non-profit institutions to manage their wealth by cultivating deep, long-term client relationships that has been the hallmark of the firm throughout its eighty-three-year history.

About Crain’s New York Business Inaugural Report and its Methodology
The profiles in this inaugural report are drawn from submitted nomination materials and Crain’s research; no individual or firm paid to be featured. Advisor honorees were selected based on several factors including the level of assets under management, inclusion in reputable advisor rankings and professional certifications and accomplishments. For others, criteria included the potential influence of the honoree’s work on the delivery and quality of financial advice and/or the extent of its innovation.
About Barrett Asset Management
Since 1937, Barrett has been putting its clients first—working to help each of them achieve their goals and aspirations. Barrett is an independent investment management firm focused on the growth and preservation of wealth for individuals, families, trusts and non-profit institutions. The firm tailors each investment portfolio based on a client’s objectives for income and growth through suitable asset allocation and individual investment selections. Barrett is a New York-based firm with more than $2.4 billion under management as of November 30, 2020. To learn more about Barrett, please visit http://www.barrettasset.com.

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