

Southwestern Investment Group's Jesse Scroggins Named to Forbes' List of Top Next-Gen Wealth Advisors

FRANKLIN, Tenn., Aug. 8, 2022 (SEND2PRESS NEWSWIRE) – Southwestern Investment Group, an independent wealth management company, is pleased to announce that Jesse Scroggins, Executive Vice President and head of the Jesse Scroggins Wealth Team, has been named to Forbes' list of Top Next-Gen Wealth Advisors. The list recognizes a select group of individuals who are 40 years of age or younger, have a minimum of four years of industry experience, and lead – or are viewed as potential leaders of – their teams.



SOUTHWESTERN INVESTMENT GROUP'S JESSE SCROGGINS

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PHOTO CAPTION: Southwestern Investment Group's Jesse Scroggins.

Jesse specializes in financial planning and holds the Accredited Asset Management Specialist (AAMS®) designation, has received his Series 7 and Series 66 licenses, and is an independent, registered representative with Raymond James Financial Services, Inc., Member FINRA/SIPC. The Jesse Scroggins Wealth Team, based in Homewood, AL, takes a highly personal approach to serving its clients, offering convenience and simplicity so clients can focus on what is important to them.

“On behalf of the firm, I want to congratulate Jesse for this significant achievement,” said Jeff Dobyms, President of Southwestern Investment Group. “He is an invaluable contributor to our team, and we couldn’t be more proud of his work and the leadership he continues to demonstrate. Jesse is the true embodiment of our firm’s values and our approach to serving clients.”

The ranking, developed by Forbes’ partner, SHOOK Research, is based on an algorithm of qualitative and quantitative data, weighing factors like revenue trends, assets under management, compliance records, industry experience, and best practices learned through telephone and in-person interviews.

Since its beginning in 2002, Southwestern Investment Group’s family of advisors has come together to provide clients with a service level that is both personal and intimate, while offering the products of a large-scale organization, thanks to its relationship with broker/dealer Raymond James Financial Services. To learn more, visit the company’s website at <https://www.swinvestmentgroup.com/>.

About Southwestern Investment Group:

As of 3/31/2022. Southwestern Investment Group was established in 2002 as an independent practice and manages more than \$5.8 billion in client assets. The advisors at Southwestern Investment Group are registered representatives with Raymond James Financial Services, a wholly-owned subsidiary of Raymond James Financial, which allows them to have the support of a large company while offering the personalized services of a small organization. Southwestern Investment Group uses sensible, sound, and conservative investment strategies and holistic services to enhance and help preserve your wealth. For more information, visit [swinvestmentgroup.com](https://www.swinvestmentgroup.com).

About Raymond James Financial Services:

As of 3/31/2022. Raymond James Financial Services, Inc. is a financial services firm supporting independent financial advisors nationwide. Since 1974, Raymond James Financial Services Inc., member FINRA/SIPC, has provided a wide range of investment and wealth planning related services through its affiliate, Raymond James & Associates, Inc., member New York Stock Exchange/SIPC. Both broker/dealers are wholly owned subsidiaries of Raymond James Financial, Inc. (NYSE-RJF), a leading diversified financial services company with approximately 8,500 financial advisors throughout the United States, Canada, and overseas. Total client assets are \$1.26 trillion. Additional information is available at <https://www.raymondjames.com/>.

Legal Disclaimer:

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The Forbes Next-Gen Wealth Advisors – Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings. The Research Summary (as of August 2022) included: 35,465 nominations for all rankings, based on thresholds, 19,986 invited to complete online survey, 14,892 telephone interviews, 3,038 in-person interviews at advisors' location, 1,357 virtual interviews and 3,513 individuals considered and 1,000 individuals won the Next-Gen ranking. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. For more information and complete details on methodology, go to <https://www.shookresearch.com/>

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Photo caption Southwestern Investment Group's Jesse Scroggins.