Advisors Recognition List Disclosures

Barron's

2011 Barron's "America's Top 1,000 Financial Advisors: State-by-State" List - Opinions are Barron's who evaluated advisors with a minimum of seven years of financial services experience and employed at their current firm for at least one year. Ranking spots are determined by each state's population and wealth. Other quantitative and qualitative measures include assets under management, revenues generated for the firm, quality of practice, regulatory records, internal company documents, and 100-plus points of advisor-provided data. Rankings do not reflect any one client's experience, endorse any advisor and do not guarantee future investment success. Compensation was not received from anyone for the study. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved.

2013 Barron's "America's Top 1,000 Financial Advisors: State-by-State" List - Opinions are Barron's who evaluated advisors with a minimum of seven years of financial services experience and employed at their current firm for at least one year. Ranking spots are determined by each state's population and wealth. Other quantitative and qualitative measures include assets under management, revenues generated for the firm, quality of practice, regulatory records, internal company documents, and 100-plus points of advisor-provided data. Rankings do not reflect any one client's experience, endorse any advisor, and do not guarantee future investment success. Compensation was not received from anyone for the study. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved.

2015 Barron's "Top 1,200 Financial Advisors" List - Opinions are Barron's who evaluated advisors with a minimum of seven years of financial services experience and employed at their current firm for at least one year. Ranking spots are determined by each state's population and wealth. Other quantitative and qualitative measures include assets under management, revenues generated for the firm, quality of practice, regulatory records, internal company documents, and 100-plus points of advisor-provided data. Rankings do not reflect any one client's experience, endorse any advisor and do not guarantee future investment success. Compensation was not received from anyone for the study. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved.

2016 Barron's "Top 1,200 Financial Advisors" List - Opinions are Barron's who evaluated advisors with a minimum of seven years of financial services experience and employed at their current firm for at least one year. Ranking spots are determined by each state's population and wealth. Other quantitative and qualitative measures include assets under management, revenues generated for the firm, quality of practice, regulatory records, internal company documents, and 100-plus points of advisor-provided data. Rankings do not reflect any one client's experience, endorse any advisor and do not guarantee future investment success. Compensation was not received from anyone for the study. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved.

2017 Barron's "Top 1,200 Financial Advisors" List - Opinions are Barron's who evaluated advisors with a minimum of seven years of financial services experience and employed at their current firm for at least one year. Ranking spots are determined by each state's population and wealth. Other quantitative and qualitative measures include assets under management, revenues generated for the firm, quality of practice, regulatory records, internal company documents, and 100-plus points of advisor-provided data. Rankings do not reflect any one client's experience, endorse any advisor and do not guarantee future investment success. Compensation was not received from anyone for the study. Barron's is a trademark of Dow Jones & Company, Inc.

2018 Barron's "Top 1,200 Financial Advisors" List - Opinions are Barron's who evaluated advisors with a minimum of seven years of financial services experience and employed at their current firm for at least one year. Ranking spots are determined by each state's population and wealth. Other quantitative and qualitative measures include assets under management, revenues generated for the firm, quality of practice, regulatory records, internal company documents and 100-plus points of advisor-provided data. Rankings do not reflect any one client's experience, endorse any advisor and do not guarantee future investment success. Compensation was not received from anyone for the study. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved.

2019 Barron's "Top 1,200 Financial Advisors" List - Opinions are Barron's who evaluated advisors with a minimum of seven years of financial services experience and employed at their current firm for at least one year. Ranking spots are determined by each state's population and wealth. Other quantitative and qualitative measures include assets under management, revenues generated for the firm, quality of practice, regulatory records, internal company documents, and 100-plus points of advisor-provided data. Rankings do not reflect any one client's experience, endorse any advisor and do not guarantee future investment success. Compensation was not received from anyone for the study. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved.

2020 Barron's "Top 1,200 Financial Advisors" List - Opinions are Barron's who evaluated advisors with a minimum of seven years of financial services experience and employed at their current firm for at least one year. Ranking spots are determined by each state's population and wealth. Other quantitative and qualitative measures include assets under management, revenues generated for the firm, quality of practice, regulatory records, internal company documents, and 100-plus points of advisor-provided data. Rankings do not reflect any one client's experience, endorse any advisor and do not guarantee future investment success. Compensation was not received from anyone for the study. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved.

2021 Barron's "Top 1,200 Financial Advisors" List - Opinions are Barron's who evaluated advisors with a minimum of seven years of financial services experience and employed at their current firm for at least one year. Ranking spots are determined by each state's population and wealth. Other quantitative and qualitative measures include assets under management, revenues generated for the firm, quality of practice, regulatory records, internal company documents, and 100-plus points of advisor-provided data. Rankings do not reflect any one client's experience, endorse any advisor and do not guarantee future investment success. Compensation was not received from anyone for the study. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved.

2022 Barron's "Top 1,200 Financial Advisors" List - Opinions are Barron's who evaluated advisors with a minimum of seven years of financial services experience and employed at their current firm for at least one year. Ranking spots are determined by each state's population and wealth. Other quantitative and qualitative measures include assets under management, revenues generated for the firm, quality of practice, regulatory records, internal company documents, and 100-plus points of advisor-provided data. Rankings do not reflect any one client's experience, endorse any advisor and do not guarantee future investment success. Compensation was not received from anyone for the study. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved.

Forbes

2018 Forbes "America's Top Next-Generation Wealth Advisors" List - Opinions provided by SHOOK® Research, LLC considered advisors born in 1979 or later with a minimum of 4 years as an advisor. Advisors have built their practices, led their own teams, joined teams, are considered future leaders, or combinations thereof. The ranking is based on in-person and telephone due-diligence meetings that measure best practices, client retention, industry experience, compliance records, firm nominations, assets under management, and Firm-generated revenue (investment performance is not a criterion). Shook's rankings do not reflect all client experiences, endorse any advisor, indicate future performance, and are available for client evaluation only. Compensation was not received from anyone for the study. Past performance is no guarantee of future results. Details are available on the SHOOK Research website. SHOOK is a registered trademark of SHOOK Research, LLC

2019 Forbes "Top Next-Generation Wealth Advisors Best-in-State" List - Opinions provided by SHOOK® Research, LLC considered advisors born in 1980 or later with a minimum of 4 years as an advisor. Advisors have built their practices, led their own teams, joined teams, are considered future leaders, or combinations thereof. The ranking is based on in-person and telephone due-diligence meetings that measure best practices, client retention, industry experience, compliance records, firm nominations, assets under management, and Firm generated revenue (investment performance is not a criterion). Shook's rankings do not reflect all client experiences, endorse any advisor, indicate future performance, and are available for client evaluation only. Compensation was not received from anyone for the study. Past performance is no guarantee of future results. Details are available on the SHOOK Research website. SHOOK is a registered trademark of SHOOK Research, LLC

2022 Forbes "Best-in-State Wealth Advisors" List - Opinions provided by SHOOK® Research, LLC and is based on in-person, virtual, and telephone due-diligence meetings that measure best practices, client retention, industry experience, credentials, compliance records, firm nominations, assets under management and Firm-generated revenue (investment performance is not a criterion). SHOOK's rankings are available for client evaluation only, are not indicative of future performance and do not represent any one client's experience and are available for investor help in evaluating the right financial advisor. Compensation was not received from anyone for the study. Past performance does not guarantee future results. Details are available on the SHOOK Research website. SHOOK is a registered trademark of SHOOK Research, LLC.

2023 Forbes "Best-in-State Wealth Advisors" List - Opinions provided by SHOOK® Research, LLC and is based on in-person, virtual, and telephone due-diligence meetings that measure best practices, client retention, industry experience, credentials, compliance records, firm nominations, assets under management and Firm-generated revenue (investment performance is not a criterion). SHOOK's rankings are available for client evaluation only, are not indicative of future performance and do not represent any one client's experience and are available for investor help in evaluating the right financial advisor. Compensation was not received from anyone for the study. Past performance does not guarantee future results. Details are available on the SHOOK Research website. SHOOK is a registered trademark of SHOOK Research, LLC.