Top Advisor Awards Disclosures

<u>2018 Barron's "Top 100 Women Financial Advisors"</u>

Named to Barron's "Top 100 Women Financial Advisors" list in 2018.*

*Source: Barron's "Top 100 Women Financial Advisors" list, June 11, 2018. Advisors considered for the "America's Top 100 Women Financial Advisors" list ranking have a minimum of seven years financial services experience and have been employed at their current firm for at least one year. Quantitative and qualitative measures used to determine the Advisor rankings include: client assets, return on assets, client satisfaction/retention, compliance records, and community involvement, among others. Barron's does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings and recognition from Barron's are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher level of performance results and such rankings should not be construed as an endorsement of the advisor.

<u>2018 Forbes "Top Women Wealth Advisors"</u>

Named to Forbes "America's Top Women Wealth Advisors" list in 2018.*

*Source: Forbes "America's Top Women Wealth Advisors" ranking was developed by SHOOK Research and is based on in-person and telephone due diligence meetings and a ranking algorithm that includes: client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: 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. Rankings are based on the opinions of SHOOK Research, LLC and not representative nor indicative of any one client's experience, future performance, or investment outcome. Neither Forbes nor SHOOK Research receives compensation in exchange for placement on the ranking. Rankings and recognition from Forbes are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher level of performance results and such rankings should not be construed as an endorsement of the advisor. Forbes is a trademark of Forbes Media LLC. All rights reserved.

<u>2018 Barron's "Top 50 Institutional Consultants"</u>

Named to Barron's "Top 50 Institutional Consultants" list in 2018.*

*Source: Barron's "Top 50 Institutional Consultants" list, April 23, 2018. The advisors in the ranking were evaluated on a range of criteria, including institutional investment assets overseen by the advisor and his/her team, the revenue generated by those assets, the number of clients served, and the number of team members and their regulatory records. Also considered were the advanced professional designations and accomplishment represented on the team. Barron's does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings and recognition from Barron's are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher level of performance results and such rankings should not be construed as an endorsement of the advisor.

<u>2018 Barron's "Top 100 Financial Advisors"</u>

Named to Barron's "Top 100 Financial Advisors" list in 2018.*

*Source: Barron's "Top 100 Financial Advisors" list, April 23, 2018. Advisors considered for the "Top 100 Financial Advisors" list ranking have a minimum of seven years financial services experience and have been employed at their current firm for at least one year. Quantitative and qualitative measures used to determine the Advisor rankings include: client assets, return on assets, client satisfaction/retention, compliance records, and community involvement, among others. Barron's does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings and recognition from Barron's are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher level of performance results and such rankings should not be construed as an endorsement of the advisor.

<u>2018 Barron's "Top 1,200 Financial Advisors"</u>

Named to Barron's "Top 1,200 Financial Advisors" list in 2018.*

*Source: Barron's "Top 1,200 Financial Advisors" list, March 12, 2018. Advisors considered for the "Top 1,200 Financial Advisors" ranking have a minimum of seven years financial services experience and have been employed at their current firm for at least one year. Quantitative and qualitative measures used to determine the advisor rankings include: This is a list of the top advisors in each state, with the number of ranking spots determined by each state's population and wealth. The rankings are based on assets under management, revenues generated by advisors for their firms, and the quality of the advisors' practices. Investment performance is not an explicit criterion because performance is often a function of each client's appetite for risk. In evaluating advisors, we examine regulatory records, internal company documents, and 100-plus points of data provided by the advisors themselves. Barron's does not receive compensation from advisors, participating firms and their affiliates, or the media in exchange for rankings. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings and recognition from Barron's are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher level of performance results and such rankings should not be construed as an endorsement of the advisor.

<u>2018 Financial Times "Top 400 Financial Advisers" (FT 400)</u>

Named to Financial Times "Top 400 Financial Advisers" list in 2018.*

*Source: The Financial Times "Top 400 Financial Advisers" (FT 400) is an independent listing produced by the Financial Times (March, 2018). The FT 400 is based on data gathered from firms and verified by broker-dealer home offices, regulatory disclosures, and the FT's research. The listing reflects each advisor's performance in six primary areas, including assets under management, asset growth, compliance record, experience, credentials and accessibility as identified by the FT. Neither the brokerages nor the advisors pay a fee to The Financial Times in exchange for inclusion in the FT 400. The ranking or ratings shown here may not be representative of all client experiences because they reflect an average or sampling of the client experiences. These rankings or ratings are not indicative of any future performance or investment outcome.

2018 Forbes "Best in State Wealth Advisors"

*Source: Forbes "Best-in-State Wealth Advisors" ranking was developed by SHOOK Research and is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes: client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: 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. Rankings are based on the opinions of SHOOK Research, LLC and not representative nor indicative of any one client's experience, future performance, or investment outcome. Neither Forbes nor SHOOK Research receives compensation in exchange for placement on the ranking. Forbes is a trademark of Forbes Media LLC.

2018 On Wall Street's "Top 40 Advisors Under 40"

*Source: *On Wall Street* is a national publication serving the wealth management industry and retail brokers working in the employee channel for wirehouses and regional broker-dealers. In January 2018, *On Wall Street* published online its "Top 40 Advisors Under 40" list, compiled using data solicited from the advisors' employers. Individual trailing 12- month production for each advisor was the primary ranking criteria. The ranking or ratings shown here may not be representative of all client experiences because they reflect an average or sampling of the client experiences. These rankings or ratings are not indicative of any future performance or investment outcome.