



# Top Advisor Recognition List Disclosures for Private Banking & Investment Group Private Wealth Advisors

#### Barron's

#### Barron's "Top 100 Financial Advisors"

burron's Top Too Financial Auvisors
Barron's "America's Top 100 Financial Advisors" 2018
Barron's "America's Top 100 Financial Advisors" 2017
Barron's "America's Top 100 Financial Advisors" 2016
Barron's "America's Top 100 Financial Advisors" 2015
Barron's "America's Top 100 Financial Advisors" 2014
Barron's "America's Top 100 Financial Advisors" 2013
Barron's "America's Top 100 Financial Advisors" 2012
<i>Barron</i> 's "America's Top 1,000 Financial Advisors: State-by-State"
<i>Barron</i> 's "America's Top 1,000 Financial Advisors: State-by-State" 2013
State-by-State" 2013 Barron's "America's Top 1,000 Financial Advisors:

State-by-State" 2010 Barron's "America's Top 1,000 Financial Advisors: State-by-State" 2009

#### Barron's "America's Top 1,200 Financial Advisors:

State-by-State" Barron's "America's Top 1,200 Financial Advisors: State-by-State" 2018 Barron's "America's Top 1,200 Financial Advisors: State-by-State" 2017 Barron's "America's Top 1,200 Financial Advisors:

State-by-State" 2016 Barron's "America's Top 1,200 Financial Advisors:

State-by-State" 2015 Barron's "America's Top 1,200 Financial Advisors: State-by-State" 2014

## Barron's "Top 100 Women Financial Advisors"

Barron's "Top 100 Women Financial Advisors" 2018 Barron's "Top 100 Women Financial Advisors" 2017 Barron's "Top 100 Women Financial Advisors" 2016 Barron's "Top 100 Women Financial Advisors" 2015 Barron's "Top 100 Women Financial Advisors" 2013 Barron's "Top 100 Women Financial Advisors" 2013

#### Barron's "Top Institutional Consultants"

Barron's "Top 50 Institutional Consultants" 2018 Barron's "Top 30 Institutional Consultants" 2017 Barron's "Top 30 Institutional Consultants" 2016

Barron's "America's Top 100 Financial Advisors"

# Wealth Management

Wealth Management "Top 100 Wirehouse Advisors in 2016" Wealth Management "Top 100 Wirehouse Advisors in 2015"

#### On Wall Street

On Wall Street–"Top 40 Under 40" 2018 On Wall Street–"Top 40 Under 40" 2017 On Wall Street–"Top 40 Under 40" 2016

#### PLANADVISER

"PLANADVISER Top 100 Retirement Plan Advisers" 2017 "PLANADVISER Top 100 Retirement Plan Advisers" 2015 "PLANADVISER Top 100 Retirement Plan Advisers" 2014

#### Financial Times

Financial Times – "Top 400 Financial Advisers" Financial Times – "Top 400 Financial Advisers" 2018 Financial Times – "Top 400 Financial Advisers" 2017 Financial Times – "Top 400 Financial Advisers" 2016 Financial Times – "Top 400 Financial Advisers" 2014 Financial Times – "Top 400 Financial Advisers" 2014

Financial Times – "Top 401 Retirement Plan Advisers" Financial Times – "Top 401 Retirement Plan Advisers" 2017 Financial Times – "Top 401 Retirement Plan Advisers" 2016 Financial Times – "Top 401 Retirement Plan Advisers" 2015

#### Forbes

Forbes "Best-in-State Wealth Advisors" 2018 Forbes "America's Top Next-Generation Wealth Advisors" 2018 Forbes/SHOOK "America's Top Next-Generation Wealth Advisors" 2017

Forbes' "America's Top Women Wealth Advisors" Forbes' "America's Top Women Wealth Advisors" 2018 Forbes' "America's Top Women Wealth Advisors" 2017 Forbes' "America's Top 250 Wealth Advisors" in 2017

### Working Mother/SHOOK Research

Working Mother/SHOOK Research's Top Wealth Adviser Moms in 2017

DUITOITS ATTELLAS	TOP TOO FINANCIAL AUVISOLS
<i>Barron</i> 's "America's Top 100 Financial Advisors" 2018 list	Source: <i>Barron</i> '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. <i>Barron's</i> does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron's</i> is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings and recognition from <i>Barron's</i> 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/100/2018.
<i>Barron</i> 's "America's Top 100 Financial Advisors" 2017 list	Source: <i>Barron's</i> "America's Top 100 Financial Advisors" list, April 17, 2017. Advisors considered for the "America's 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. <i>Barron's</i> does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron's</i> is a trademark of Dow Jones & Company, Inc. All rights reserved. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/100/2017.
<i>Barron</i> 's "America's Top 100 Financial Advisors" 2016 list	Source: <i>Barron's</i> "America's Top 100 Financial Advisors" list, April 18, 2016. Advisors considered for the "America's 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. <i>Barron's</i> does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron's</i> is a trademark of Dow Jones & Company, Inc. All rights reserved. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/100/2016.
<i>Barron</i> 's "America's Top 100 Financial Advisors" 2015 list	Source: <i>Barron's</i> "America's Top 100 Financial Advisors" list, March 23, 2015. Advisors considered for the "America's 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. <i>Barron's</i> does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron's</i> is a trademark of Dow Jones & Company, Inc. All rights reserved. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/100/2015.
<i>Barron</i> 's "America's Top 100 Financial Advisors" 2014 list	Source: <i>Barron's</i> "America's Top 100 Financial Advisors" list, April 24, 2014. Advisors considered for the "America's 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. <i>Barron's</i> does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron's</i> is a trademark of Dow Jones & Company, Inc. All rights reserved. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/100/2014.
<i>Barron's</i> "America's Top 100 Financial Advisors" 2013 list	Source: <i>Barron's</i> "America's Top 100 Financial Advisors" list, April 25, 2013. Advisors considered for the "America's 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. <i>Barron's</i> does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron's</i> is a trademark of Dow Jones & Company, Inc. All rights reserved. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/100/2013.
Barron's "America's Top 100 Financial Advisors" 2012 list	Source: <i>Barron's</i> "America's Top 100 Financial Advisors" list, April 16, 2012. Advisors considered for the "America's 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. <i>Barron's</i> does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron's</i> is a trademark of Dow Jones & Company, Inc. All rights reserved. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/100/2012.

#### Barron's "America's Top 1,000 Financial Advisors: State-by-State"

Barron's "America's Top 1,000 Financial Advisors: State-by-State" 2013 list
Source: Barron's magazine, Feb. 18, 2013, Top 1,000 Financial Advisors list. Advisors considered for the "America's Top 1,000 Financial Advisors: State-by-State" 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. The ranking or ratings shown here may not be representative of all client experiences because they reflect an average or

▲ return to top

	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. For more information, visit https://www.barrons.com/report/top-financial-advisors/1000/2013.
<i>Barron's</i> "America's Top 1,000 Financial Advisors: State-by- State" 2012 list	Source: <i>Barron's</i> magazine, February 20, 2012, Top 1,000 Financial Advisors list. Advisors considered for the "America's Top 1,000 Financial Advisors: State-by-State" 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. <i>Barron's</i> does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron's</i> is a trademark of Dow Jones & Company, Inc. All rights reserved. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/1000/2012.
<i>Barron's</i> "America's Top 1,000 Financial Advisors: State-by- State" 2011 list	Source: <i>Barron's</i> magazine, February 21, 2011, Top 1,000 Financial Advisors list. Advisors considered for the "America's Top 1,000 Financial Advisors: State-by-State" 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. <i>Barron's</i> does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron's</i> is a trademark of Dow Jones & Company, Inc. All rights reserved. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/1000/2011.
<i>Barron's</i> "America's Top 1,000 Financial Advisors: State-by- State" 2010 list	Source: <i>Barron</i> 's magazine, February 22, 2010, Top 1,000 Financial Advisors list. Advisors considered for the "America's Top 1,000 Financial Advisors: State-by-State" 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. <i>Barron</i> 's does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron</i> 's is a trademark of Dow Jones & Company, Inc. All rights reserved. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/1000/2010.
<i>Barron's</i> "America's Top 1,000 Financial Advisors: State-by- State" 2009 list	Source: <i>Barron</i> 's magazine, February 9, 2009, Top 1,000 Financial Advisors list. Advisors considered for the "America's Top 1,000 Financial Advisors: State-by-State" 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. <i>Barron</i> 's does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron</i> 's is a trademark of Dow Jones & Company, Inc. All rights reserved. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/1000/2009.
	▲ return to top
Barron's "America's	Top 1,200 Financial Advisors: State-by-State"
<i>Barron's</i> "America's Top 1,200 Financial Advisors: State-by- State" 2018 list	Source: <i>Barron</i> '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. <i>Barron</i> 's does not receive compensation from advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron</i> 's is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings and recognition from <i>Barron</i> '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. For more information, visit https://www.barrons.com/
<i>Barron</i> 's "America's Top 1,200 Financial Advisors: State-by- State" 2017 list	Source: <i>Barron's</i> "America's Top 1,200 Financial Advisors: State-by-State" list, March 6, 2017. Advisors considered for the "America's Top 1,200 Financial Advisors: State-by-State" 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. <i>Barron's</i> does not receive compensation from advisors,

**include Stop 1,200** Financial Advisors: State-by-State list, March 6, 2017. Advisors Considered for the "America's Top 1,200 Financial Advisors: State-by-State" 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. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/1000/2017.

Barron's "America's Top 1,200
Source: Barron's "America's Top 1,200 Financial Advisors: State-by-State" list, March 7, 2016. Advisors considered for the "America's Top 1,200 Financial Advisors: State-by-State" 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. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/1000/2016.

*Barron's* "America's Top 1,200 Financial Advisors: State-by-State" 2015 list
Source: *Barron's* "America's Top 1,200 Financial Advisors: State-by-State" 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. 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. For more information, visit https://www.barrons.com/report/ top-financial-advisors/1000/2015.

Barron's "America's Top 1,200
Financial Advisors: State-byState" 2014 list
Source: Barron's "America's Top 1,200 Financial Advisors: State-by-State" 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. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/1000/2014.

▲ return to top

# Barron's "Top 100 Women Financial Advisors"

<i>Barron's</i> "Top 100 Women Financial Advisors" 2018 list	Source: <i>Barron's</i> "Top 100 Women Financial Advisors" list, June 11, 2018. Advisors considered for the "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. <i>Barron's</i> does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron's</i> is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings and recognition from <i>Barron's</i> 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/women/2018.	
<i>Barron's</i> "Top 100 Women Financial Advisors" 2017 list	Source: <i>Barron's</i> "Top 100 Women Financial Advisors" list, June 5, 2017. Advisors considered for the "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. <i>Barron's</i> does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron's</i> is a trademark of Dow Jones & Company, Inc. All rights reserved. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/women/2017.	
<i>Barron's</i> "Top 100 Women Financial Advisors" 2016 list	Source: <i>Barron's</i> "Top 100 Women Financial Advisors" list, June 6, 2016. Advisors considered for the "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. <i>Barron's</i> does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron's</i> is a trademark of Dow Jones & Company, Inc. All rights reserved. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/women/2016.	
<i>Barron</i> 's "Top 100 Women Financial Advisors" 2015 list	Source: <i>Barron</i> 's "Top 100 Women Financial Advisors" list, June 7, 2015. Advisors considered for the "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. <i>Barron</i> 's does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron</i> 's is a trademark of Dow Jones & Company, Inc. All rights reserved. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/women/2015.	
<i>Barron</i> 's "Top 100 Women Financial Advisors" 2014 list	Source: <i>Barron</i> 's "Top 100 Women Financial Advisors" list, June 9, 2014. Advisors considered for the "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. <i>Barron</i> 's does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron</i> 's is a trademark of Dow Jones & Company, Inc. All rights reserved. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/women/2014.	
<i>Barron</i> 's "Top 100 Women Financial Advisors" 2013 list	Source: <i>Barron's</i> "Top 100 Women Financial Advisors" list, June 10, 2013. Advisors considered for the "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. <i>Barron's</i> does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron's</i> is a trademark of Dow Jones & Company, Inc. All rights reserved. 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. For more	

information, visit https://www.barrons.com/report/top-financial-advisors/women/2013.

<i>Barron's</i> "Top 100 Women Financial Advisors" 2012 list	Source: Barron's "Top 100 Women Financial Advisors" list, June 4, 2012. Advisors considered for the "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. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/women/2012.
Barron's "Top 50 Ins Barron's "Top 50 Institutional Consultants" 2018 list	titutional Consultants" – GIC/BAML Only 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.
<i>Barron's</i> "Top 30 Institutional Consultants" 2017 list	For more information, visit http://online.wsj.com/public/resources/documents/Top50InstitutionalConsultants.pdf. Source: <i>Barron's</i> "Top 30 Institutional Consultants" list, April 17, 2017. 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. <i>Barron's</i> does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron's</i> is a trademark of Dow Jones & Company, Inc. All rights reserved. For more information, visit
<i>Barron's</i> "Top 30 Institutional Consultants" 2016 list	https://www.barrons.com/articles/where-the-big-money-gets-its-advice-1492233216. Source: <i>Barron</i> 's "Top Institutional Financial Advisors" list, April 16, 2016. The ranking features the top institutional consulting teams from traditional brokerage firms as well as registered investment advisor (RIA) firms and independent broker-dealers. The teams in the ranking were evaluated on a range of criteria, including institutional investment assets overseen by the team, the revenue generated by those assets, the number of clients served by the team, and the number of team members and their regulatory records. Also considered were the advanced professional designations and accomplishments represented on the team. <i>Barron</i> 's does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. <i>Barron</i> 's is a trademark of Dow Jones & Company, Inc. All rights reserved. For more information, visit https://www.barrons-conferences.com/uploads/5/4/4/3/54430727/ top30institutional2016.pdf.
Wealth Management Wealth Management "Top 100 Wirehouse Advisors in 2016" list	<b>"Top 100 Wirehouse Advisors"</b> Source: Wealth Management Magazine, May 1, 2016, "Top 100 Wirehouse Advisors in 2016" list. Advisors on the Wealth Management magazine "Top 100 Wirehouse Advisors in 2016" list are ranked exclusively by assets under management custodied at the four wirehouse firms. Only advisors for whom 80 percent or more of assets correspond to retail clients were eligible for the list. Wealth Management.com does not receive any compensation from financial advisors, participating firms and affiliates, or the media in exchange for rankings. <i>Wealth Management</i> Magazine is a trademark of Penton Media, Inc. All rights reserved. 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. For more information, visit https://www.wealthmanagement.com/rankings/top-100-wirehouse-advisors-2016.
Wealth Management "Top 100 Wirehouse Advisors in 2015" list	Source: Wealth Management Magazine, May 3, 2015, "Top 100 Wirehouse Advisors in 2015" list. Advisors on the Wealth Management magazine "Top 100 Wirehouse Advisors in 2015" list are ranked exclusively by assets under management custodied at the four wirehouse firms. Only advisors for whom 80 percent or more of assets correspond to retail clients were eligible for the list. Wealth Management.com does not receive any compensation from financial advisors, participating firms and affiliates, or the media in exchange for rankings. <i>Wealth Management</i> Magazine is a trademark of Penton Media, Inc. All rights reserved. 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. For more information, visit https://www.wealthmanagement.com/rankings/top-100-wirehouse-advisors-2015.
On Wall Street "Top 40	*Source: On Wall Street is a national publication serving the wealth management industry and retail brokers working
Under 40" 2018 list On Wall Street- "Top 40 Under 40" 2017 list	in the employee channel for wirehouses and regional broker-dealers. In January 2018, <i>On Wall Street</i> 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. For more information, visit https://onwallstreet.financial-planning.com/top-40-under-40. *Source: <i>On Wall Street</i> 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 2017, <i>On Wall Street</i> published online "The Top 40 Under" 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.
On Wall Street- "Top 40 Under 40" 2016 list	These rankings or ratings are not indicative of any future performance or investment outcome. For more information, visit https://onwallstreet.financial-planning.com/top-40-under-40. *Source: <i>On Wall Street</i> is a national publication serving the retail brokers and financial services industry. In the January, 2016 issue, <i>On Wall Street</i> published "The 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. For more information, visit https://onwallstreet.financial-planning.com/top-40-under-40.
"PLANADVISER Top	▲ return to top 100 Retirement Plan Advisers"
"PLANADVISER Top 100 Retirement Plan Advisers" 2017 list "PLANADVISER Top 100	The 2017 PLANSPONSOR Retirement Plan Advisers of the Year—the finalists and the winners—provide advisory practices that have demonstrated an unfailing commitment to helping plan sponsors meet their fiduciary responsibilities and to assisting plan participants sufficiently prepare for retirement. The award includes winners across four categories: individual, small team, large team and mega team. The following profiles on the winners and finalists illuminate the best that the retirement planning industry has to offer. For more information, visit https://www.planadviser.com/awards/top-100/#!/2017/List-By-Category.
Retirement Plan Advisers" 2015 list	100 Retirement Plan Advisers' list, advisers had to either submit information and references or be nominated and enter the award process for 2014 PLANSPONSOR Retirement Plan Adviser of the Year—individual, team or multioffice team. Nominees were then asked to complete a form, providing various details about their practice, some of which appear here. Advisers could also, for the first time, submit such information unsolicited, although not to be considered for the awards. The <i>PLANADVISER</i> Top 100 Retirement Plan Financial Advisers list is drawn solely from a smaller set of quantitative factors and information supplied by the advisers themselves. PLANSPONSOR and <i>PLANADVISER</i> are not affiliates of Bank of America Corporation. 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. For more information, visit http://www.planadviser.com/The_2015_ PLANADVISER_Top_100_Retirement_Plan_Advisers.aspx.
"PLANADVISER Top 100 Retirement Plan Advisers" 2014 list	As published in the January-February 2014 issue of <i>PLANADVISER</i> . To be considered for the annual " <i>PLANADVISER</i> Top 100 Retirement Plan Advisers" list, advisers had to either submit information and references or be nominated and enter the award process for 2014 PLANSPONSOR Retirement Plan Adviser of the Year—individual, team or multioffice team. Nominees were then asked to complete a form, providing various details about their practice, some of which appear here. Advisers could also, for the first time, submit such information unsolicited, although not to be considered for the awards. The <i>PLANADVISER</i> Top 100 Retirement Plan Financial Advisers list is drawn solely from a smaller set of quantitative factors and information supplied by the advisers themselves. PLANSPONSOR and <i>PLANADVISER</i> are not affiliates of Bank of America Corporation. 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. For more information, visit https://www.planadviser.com/awards/top-100/#1/2014/List-By-Category.
	▲ return to top
Financial Times–"Top 400 Financial Advisers" 2018 list	Source: The <i>Financial Times</i> "Top 400 Financial Advisers" (FT 400) is an independent listing produced by the <i>Financial Times</i> (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 adviser'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 advisers pay a fee to The <i>Financial Times</i> 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. For more information, visit http://prod-upp-image-read.ft.com/219a1dce-2c60-11e8-9b4b-bc4b9f08f381.
Financial Times-"Top 400 Financial Advisers" 2017 list	Source: The <i>Financial Times</i> "Top 400 Financial Advisers" (FT 400) is an independent listing produced by the <i>Financial Times</i> (March, 2017). 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 adviser'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 advisers pay a fee to The <i>Financial Times</i> 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. For more information, visit http://im.ft-static.com/content/images/21339400-1479-140-147-417acCa7e.pdf
Financial Times–"Top 400 Financial Advisers" 2016 list	11e7-b0c1-37e417ee6c76.pdf. Source: The <i>Financial Times</i> "Top 400 Financial Advisers" (FT 400) is an independent listing produced by the <i>Financial Times</i> (March, 2016). 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 adviser'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 advisers pay a fee to The <i>Financial Times</i> 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. For more information, visit http://www.money-media.com/images/email/FT_400/Top-Financial-Advisers-2016.pdf.
Financial Times–"Top 400 Financial Advisers" 2015 list	Source: The <i>Financial Times</i> "Top 400 Financial Advisers" (FT 400) is an independent listing produced by the <i>Financial Times</i> (March, 2015). 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 adviser'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 advisers pay a fee to The <i>Financial Times</i> 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. For more information, visit https://www.ft.com/content/72324484-cb3f-11e5-a8ef-ea66e967dd44.
Financial Times-"Top 400 Financial Advisers" 2014 list	Source: The <i>Financial Times</i> "Top 400 Financial Advisers" (FT 400) is an independent listing produced by the <i>Financial Times</i> (March, 2014). 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 adviser'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 advisers pay a fee to The <i>Financial Times</i> 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. For more information, visit http://im.ft-static.com/content/images/ce3f96a2-b30c-11e3-8038-00144feabdc0.pdf.
Financial Times-"Top 400 Financial Advisers" 2013 list	Source: The Financial Times "Top 400 Financial Advisers" (FT 400) is an independent listing produced by the Financial Times (March, 2013). 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 adviser'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 advisers 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. For more information, visit https://aboutus.ft.com/en-gb/announcements/financial-times-announces-top-400-us-advisors-of-2013/.
Financial Times – "Top 401	p 401 Retirement Plan Advisers" Source: The Financial Times "Top 401 Retirement Advisers" list (FT 401) is an independent listing produced by the
Retirement Plan Advisers" 2017 list	Financial Times (September 2017). The FT 401 is based on data gathered from financial advisors, regulatory disclosures, and the FT's research. The listing reflects each advisor's status in seven primary areas, including Defined Contribution (DC) plan assets under management, growth in DC plan business, specialization in DC plan business, and other factors. This award does not evaluate the quality of services provided to clients and is not indicative of this advisor's future performance. Neither the advisors nor their parent firms pay a fee to Financial Times in exchange for inclusion in the FT 401. For more information, visit https://www.ft.com/content/8289a1ca-8f19-11e7-a352-e46f43c5825d?mhq5j=e5.
Financial Times-"Top 401 Retirement Plan Advisers" 2016 list	Source: The <i>Financial Times</i> "Top 401 Retirement Plan Advisers" is an independent listing produced by the <i>Financial Times</i> (September, 2016). The FT 401 is based on data gathered from financial advisers, firms, regulatory disclosures, and the FT's research. The listing reflects each advisor's performance in eight primary areas, including: DC plan assets under management; DC plan assets as a percentage of overall AUM; growth in DC plan AUM; growth in DC plans advised; DC plan employee participation; professional designations; experience; and compliance record. Neither the brokerages nor the advisers pay a fee to The <i>Financial Times</i> in exchange for inclusion in the FT 401. 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. For more information, visit https://aboutus.ft.com/en-gb/announcements/financial-times-reveal-the-top-401-retirement-advisers-of-2016/.
Financial Times–"Top 401 Retirement Plan Advisers" 2015 list	Source: The <i>Financial Times</i> "Top 401 Retirement Plan Advisers" is an independent listing produced by the <i>Financial Times</i> (September, 2015). The FT 401 is based on data gathered from financial advisers, firms, regulatory disclosures, and the FT's research. The listing reflects each adviser's performance in eight primary areas, including: DC plan assets under management; DC plan assets as a percentage of overall AUM; growth in DC plan AUM; growth in DC plans advised; DC plan employee participation; professional designations; experience; and compliance record. Neither the brokerages nor the advisers pay a fee to The <i>Financial Times</i> in exchange for inclusion in the FT 401. 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. For more information, visit https://aboutus.ft.com/en-gb/announcements/financial-times-reveals-the-top-401-retirement-advisers-of-2015/.
Forbes "Best-in-Stat Forbes "Best-in-State Wealth Advisors" 2018 list	Source: <i>Forbes</i> "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 <i>Forbes</i> nor SHOOK Research receives compensation in exchange
	for placement on the ranking. Forbes is a trademark of Forbes Media LLC. All rights reserved. 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. For more information, visit https://www.forbes.com/best-in-state-wealth-advisors/#d7e9673291d1.
Forbes/SHOOK "Ame Forbes "America's Top Next-Generation Wealth Advisors" 2018 list	erica's Top Next-Generation Wealth Advisors" list was developed by SHOOK Research. Advisors considered for this ranking were born in 1980 or later with a minimum 4 years relevant experience; advisors have: built their own practices and lead their teams; joined teams and are viewed as future leadership; or a combination of both. Ranking algorithm is based on qualitative measures: telephone and in-person interviews, client retention, industry experience, credentials, review of compliance records, firm nominations; and quantitative criteria, such as: assets under management and revenue generated for their firms. Investment performance is not a criteria 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
Forbes/SHOOK "America's Top Next-Generation Wealth Advisors" 2017 list	placement on the ranking. Forbes is a trademark of Forbes Media LLC. All rights reserved. For more information, visit https://www.forbes.com/top-next-gen-advisors/#c7072b16df01. Source: <i>Forbes</i> /SHOOK "America's Top Next-Generation Wealth Advisors" list was developed by SHOOK Research. Advisors considered for this ranking were born in 1980 or later with a minimum 4 years relevant experience; advisors have: built their own practices and lead their teams; joined teams and are viewed as future leadership; or a combination of both. Ranking algorithm is based on qualitative measures: telephone and in-person interviews, client retention, industry experience, credentials, review of compliance records, firm nominations; and quantitative criteria, such as: assets under management and revenue generated for their firms. Investment performance is not a criteria because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOKResearch, LLC, which does not receive compensation from the advisors or their firms in exchange for placement on a ranking. 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
<i>Forbes' "</i> America's To	or investment outcome. For more information, visit https://www.forbes.com/top-millennial-advisors/#324f4f545aed return to top Op Women Wealth Advisors"
Forbes' "America's Top Women Wealth Advisors" 2018 list	Source: <i>Forbes</i> "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 <i>Forbes</i> nor SHOOK Research receives compensation in exchange for placement on the ranking. <i>Forbes</i> is a trademark of <i>Forbes</i> Media LLC. All rights reserved. For more information, visit https://www.forbes.com/top-women-advisors/#1f3a74b251f4
Forbes' "America's Top Women Wealth Advisors" 2017 list	advisors/#1f3a74b251f4. Source: "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 or representative of any one client's experience. Neither <i>Forbes</i> nor SHOOK Research receives compensation in exchange for placement on the ranking. For more information: www.SHOOK research.com. 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
Forhes' Amorica's T	of any future performance or investment outcome. For more information, visit https://www.forbes.com/sites/ halahtouryalai/2017/02/28/americas-top-women-advisors/#3f451d1d1e17.
Forbes' America's To Forbes' "America's Top 250 Wealth Advisors" in 2017	Source: The <i>Forbes</i> ranking of "America's Top 250 Wealth Advisors", developed by SHOOK Research, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors with a minimum of seven years of experience and weighing factors like revenue trends, assets under management, compliance records, industry experience and best practices learned through telephone and in-person interviews. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Neither <i>Forbes</i> or SHOOK receive a fee in exchange for rankings. 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. For more information, visit https://www.forbes.com/sites/halahtouryalai/2017/09/26/americas-top-wealth-advisors-2017/#44e135e44851.
5	▲ return to top
Working Mother/SHOOK Research's Top Wealth Adviser Moms in 2017	Source: For Working Mother/SHOOK Research's "Top Wealth Adviser Moms" list, SHOOK™ Research considered Wealth Advisors who are mothers with children living at home and under the age of 18. 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. Rankings are based on the opinions of SHOOK Research, LLC. Neither SHOOK nor <i>Working Mother</i> receives compensation from the advisors or their firms in exchange for placement on a ranking. For more information see http://details-he.re/4JoTZ9. The ranking or

client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC. Neither SHOOK nor *Working Mother* receives compensation from the advisors or their firms in exchange for placement on a ranking. For more information see http://details-he.re/4JoTZ9. The ranking or ratings shown here may not be representative of all client experiences because they reflect an average or sampling of