Barron's

Barron's "Top 100 Financial Advisors"

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

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" 2014

Barron's "Top 100 Women Financial Advisors" 2013 Barron's "Top 100 Women Financial Advisors" 2012

Barron's Top Institutional Consultants

Barron's "America's Top 100

Financial Advisors" 2018 list

Barron's "America's Top 100

Financial Advisors" 2017 list

Barron's "America's Top 100

Financial Advisors" 2016 list

Barron's "America's Top 100

Financial Advisors" 2015 list

Barron's "America's Top 100

Financial Advisors" 2014 list

Barron's "America's Top 100 Financial Advisors" 2013 list

Barron's "America's Top 100

Financial Advisors" 2012 list

Barron's "America's Top 1,000

Financial Advisors: State-by-

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Financial Advisors: State-by-

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

Barron's "America's Top 1,000

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

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Barron's "America's Top 1,200

Barron's "America's Top 1,200

Barron's "America's Top 1,200

Financial Advisors: State-by-

Barron's "Top 100 Women

Financial Advisors" 2012 list

Barron's "Top 50 Institutional Consultants" 2018 list

Barron's "Top 30 Institutional Consultants" 2017 list

Barron's "Top 30 Institutional

Consultants" 2016 list

Wealth Management "Top

100 Wirehouse Advisors

Wealth Management "Top

100 Wirehouse Advisors

On Wall Street- "Top 40 Under 40" 2018 list

On Wall Street- "Top 40

On Wall Street- "Top 40

"PLANADVISER Top 100

"PLANADVISER Top 100 Retirement Plan Advisers"

"PLANADVISER Top 100

Retirement Plan Advisers"

Financial Times - "Top 400

Financial Times – "Top 400

Financial Times - "Top 400

Financial Times - "Top 400

Financial Times - "Top

Financial Times - "Top

400 Financial Advisers"

Financial Times -"Top 401 Retirement Plan Advisers"

Financial Times – "Top 401

Retirement Plan Advisers"

Financial Times - "Top 401

Retirement Plan Advisers"

Forbes "Best-in-State Wealth

Forbes Top Next-Generation

Wealth Advisors 2018 list

Forbes/SHOOK "America's

Forbes' "America's Top

Forbes' "America's Top Women Wealth Advisors"

Forbes' "America's Top 250

Wealth Advisors" in 2017

Working Mother/SHOOK Research's Top Wealth

Adviser Moms in 2017

2018 list

2017 list

Women Wealth Advisors'

Top Next-Generation Wealth Advisors" 2017 list

Advisors" 2018 list

Forbes "Best-in-State Wealth Advisors"

2014 list

2013 list

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2016 list

2015 list

400 Financial Advisers"

Financial Advisers" 2015 list

Financial Advisers" 2016 list

Financial Advisers" 2017 list

Financial Advisers" 2018 list

2017 list

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2014 list

Retirement Plan Advisers"

Under 40" 2016 list

Under 40" 2017 list

On Wall Street "Top 40 Under 40"

in 2016" list

in 2015" list

Financial Advisors" 2013 list

Financial Advisors" 2014 list

Financial Advisors" 2015 list

Financial Advisors" 2016 list

Financial Advisors" 2017 list

Financial Advisors" 2018 list

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State" 2017 list

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State" 2015 list

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Financial Advisors: State-by-

State" 2013 list

State" 2012 list

State" 2011 list

State" 2010 list

State" 2009 list

State" 2018 list

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"

State-by-State" 2017

State-by-State" 2016

State-by-State" 2015

State-by-State" 2014

Top Advisor Recognition List Disclosures

PLANADVISER "PLANADVISER Top 100 Retirement Plan Advisers" 2015

Financial Times – "Top 400 Financial Advisers" 2017 Financial Times – "Top 400 Financial Advisers" 2016 Financial Times – "Top 400 Financial Advisers" 2015 Financial Times - "Top 400 Financial Advisers" 2014

Financial Times - "Top 400 Financial Advisers" Financial Times - "Top 400 Financial Advisers" 2018 Barron's "America's Top 1,200 Financial Advisors:

Financial Times – "Top 400 Financial Advisers" 2013 Barron's "America's Top 1,200 Financial Advisors: State-by-State" 2018 Financial Times - "Top 401 Retirement Plan Advisers"

Forbes

Advisors" 2017

in 2017

ource: 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. For

Source: Barron's "America's Top 100 Financial Advisors" list, April 17, 2017. Advisors considered for the "America's Top

Source: Barron's "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. 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

Source: Barron's "America's Top 100 Financial Advisors" list, March 23, 2015. Advisors considered for the "America's Top

Source: Barron's "America's Top 100 Financial Advisors" list, April 24, 2014. Advisors considered for the "America's Top

Source: Barron's "America's Top 100 Financial Advisors" list, April 25, 2013. Advisors considered for the "America's Top

Source: Barron's "America's Top 100 Financial Advisors" list, April 16, 2012. Advisors considered for the "America's Top

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 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.

Source: Barron's 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. 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/1000/2012.

Source: Barron's 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. 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 $investment\ outcome.\ For\ more\ information,\ visit\ https://www.barrons.com/report/top-financial-advisors/1000/2011.$

Source: Barron'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. 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/1000/2010.

Source: Barron'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. 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/1000/2009.

Source: Barron's "Top 1,200 Financial Advisors" list, March 12, 2018. Advisors considered for the "Top 1,200 Financial

Source: Barron's "America's Top 1,200 Financial Advisors: State-by-State" list, March 6, 2017. Advisors considered for

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-

Source: Barron's "America's Top 1,200 Financial Advisors: State-by-State" list, March 7, 2016. Advisors considered for

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-

Source: Barron's "America's Top 1,200 Financial Advisors: State-by-State" list, February 23, 2015. Advisors considered

Source: Barron's "America's Top 1,200 Financial Advisors: State-by-State" list, February 24, 2014. Advisors considered

Source: Barron's "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. 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. For more information, visit https://www.barrons.com/report/top-financial-advisors/women/2018.

Source: Barron's "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. 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

Source: Barron's "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

Source: Barron'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. 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

Source: Barron's "Top 100 Women Financial Advisors" list, June 9, 2014. Advisors considered for the "Top 100 Women

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Source: Barron's "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. 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

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

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. For $more\ information, visit\ http://online.wsj.com/public/resources/documents/Top50InstitutionalConsultants.pdf.$

Source: Barron's "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. 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. For more information, visit https://

Source: Barron'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. 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. For more information, visit https://www.barrons-conferences.com/uploads/5/4/4/3/54430727/

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

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. Wealth Management 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.

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

*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. For more information, visit https://onwallstreet.

*Source: On Wall Street is a national publication serving the wealth management industry and retail brokers working in

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*Source: On Wall Street is a national publication serving the retail brokers and financial services industry. In the January,

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-

As published in the January-February 2015 issue of PLANADVISER. To be considered for the annual "PLANADVISER 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 PLANADVISER 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 PLANADVISER 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/The_2015_

As published in the January-February 2014 issue of PLANADVISER. To be considered for the annual "PLANADVISER Top

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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 PLANADVISER 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 PLANADVISER 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-

Source: The Financial Times "Top 400 Financial Advisers" (FT 400) is an independent listing produced by the Financial

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Source: The Financial Times "Top 400 Financial Advisers" (FT 400) is an independent listing produced by the Financial

Source: The Financial Times "Top 400 Financial Advisers" (FT 400) is an independent listing produced by the Financial

Source: The Financial Times "Top 401 Retirement Advisers" list (FT 401) is an independent listing produced by the 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 the Financial Times in exchange for inclusion in the FT 401. For

Source: The Financial Times "Top 401 Retirement Plan Advisers" is an independent listing produced by the Financial Times

Source: The Financial Times "Top 401 Retirement Plan Advisers" is an independent listing produced by the Financial Times (September, 2015). The FT 401 is based on data gathered from financial advisers, firms, regulatory disclosures, and the

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. 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

Source: Forbes' "America's Top Next-Generation Wealth Advisors" list was developed by SHOOK Research. Advisors

Source: Forbes/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 four years relevant experience; advisors

Source: Forbes "America's Top Women Wealth Advisors" ranking was developed by SHOOK Research and is based on

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. All rights reserved. For more information, visit https://www.forbes.com/top-women-

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 reports. Rankings are based on the opinions of SHOOK Research, LLC and not indicative of future performance or representative of any one client's experience. Neither Forbes nor SHOOK Research receives compensation in exchange for placement on the ranking. For more information: www.SHOOKresearch. 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 of any future performance or investment outcome. For more information, visit https://www.forbes.com/sites/halahtouryalai/2017/02/28/americas-top-

Source: The Forbes 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 Forbes 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-

Source: For Working Mother/SHOOK Research's "Top Wealth Adviser Moms" list, SHOOK™ Research considered Wealth

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 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 the client experiences. These rankings or ratings are not indicative of any future performance or investment outcome. For

more information, visit https://www.workingmother.com/top-wealth-adviser-moms-2017.

Advisors who are mothers with children living at home and under the age of 18. Ranking algorithm is based on qualitative

in-person and telephone due diligence meetings and a ranking algorithm that includes: client retention, industry

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

considered for this ranking were born in 1980 or later with a minimum four 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 placement on the ranking. Forbes is a trademark of Forbes Media LLC. All rights reserved. For more information, visit https://www.

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Forbes/SHOOK "America's Top Next-Generation Wealth Advisors"

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wealth-advisors-2017/#44e135e44851.

Working Mother/SHOOK Research's Top Wealth Adviser Moms

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Forbes' America's Top 250 Wealth Advisors

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 Financial Times 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/. The substitution of the property of the propert

(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 Financial Times 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/.

more information, visit https://www.ft.com/content/8289a1ca-8f19-11e7-a352-e46f43c5825d?mhq5j=e5.

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-

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more information, visit https://onwallstreet.financial-planning.com/top-40-under-40.

2016 issue, On Wall Street 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

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. Wealth Management 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.

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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-

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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. For more information, visit https://www.barrons.com/

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