

Top Advisor Recognition List Disclosures

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

Click on any recognition below

to jump to its disclosure

On Wall Street On Wall Street - "Top 40 Under 40" 2019

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

Forbes

in 2017

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

Barron's "America's Top 100 Financial Advisors" Barron's "America's Top 100 Financial Advisors" 2018

for Merrill Wealth Management Advisors Barron's

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 State-by-State" Barron's "America's Top 1,000 Financial Advisors: State-by-State" 2013

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

Barron's "America's Top 1,000 Financial Advisors: State-by-State" 2012 Barron's "America's Top 1,000 Financial Advisors:

State-by-State" 2011 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

State-by-State"

Barron's "America's Top 1,200 Financial Advisors: Barron's "America's Top 1,200 Financial Advisors: State-by-State" 2019 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" 2014

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

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" 2018 list

Barron's "America's Top 100 Financial Advisors Source: Barron's "Top 100 Financial Advisors" list, April 23, 2018. Advisors considered for the "Top 100 Financial Advisors" list ranking have a minimum of seven years financial services experience and have been employed at their current firm for at least one year. Quantitative and qualitative measures used to determine the Advisor rankings include: client assets,

return on assets, client satisfaction/retention, compliance records, and community involvement, among others. Barron's

does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings and recognition from Barron's are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher level of performance results and such rankings should not be construed as an endorsement of the advisor. For more information, visit https://www.barrons.com/report/top-financial-advisors/100/2018.

Barron's "America's Top 100

Financial Advisors" 2017 list 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  $information, visit \ https://www.barrons.com/report/top-financial-advisors/100/2017.$ 

Barron's "America's Top 100 Financial Advisors" 2016 list

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 information, visit https://www.barrons.com/report/top-financial-advisors/100/2016. Source: Barron's "America's Top 100 Financial Advisors" list, March 23, 2015. Advisors considered for the "America's Top Barron's "America's Top 100 Financial Advisors" 2015 list

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 information, visit https://www.barrons.com/report/top-financial-advisors/100/2015.

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

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

 $information, visit \ https://www.barrons.com/report/top-financial-advisors/100/2014.$ Source: Barron's "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. 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/100/2013. Source: Barron's "America's Top 100 Financial Advisors" list, April 16, 2012. Advisors considered for the "America's Top Barron's "America's Top 100

Financial Advisors" 2012 list

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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/100/2012. Barron's "America's Top 1,000 Financial Advisors: State-by-State" Barron's "America's Top 1,000 Source: Barron's magazine, Feb. 18, 2013, Top 1,000 Financial Advisors list. Advisors considered for the "America's Top Financial Advisors: State-by-1,000 Financial Advisors: State-by-State" ranking have a minimum of seven years financial services experience and have

State" 2013 list 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 Barron's "America's Top 1,000 Financial Advisors: State-by-Top 1,000 Financial Advisors: State-by-State" ranking have a minimum of seven years financial services experience and State" 2012 list 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 Barron's "America's Top 1,000 Financial Advisors: State-by-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 State" 2011 list 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. Barron's "America's Top 1.000 Source: Barron's magazine, February 22, 2010, Top 1,000 Financial Advisors list. Advisors considered for the "America's Financial Advisors: State-by-Top 1,000 Financial Advisors: State-by-State" ranking have a minimum of seven years financial services experience and State" 2010 list 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. Barron's "America's Top 1,000 Source: Barron's magazine, February 9, 2009, Top 1,000 Financial Advisors list. Advisors considered for the "America's Top

Financial Advisors: State-by-

State" 2009 list

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  $investment\ outcome.\ For\ more\ information,\ visit\ https://www.barrons.com/report/top-financial-advisors/1000/2009.$ Barron's "America's Top 1,200 Financial Advisors: State-by-State" Barron's "America's Top 1,200 Source: Barron's "Top 1,200 Financial Advisors" list, March 11, 2019. The ranking considered advisors with a minimum of Financial Advisors: State-byseven years financial services experience and have been employed at their current firm for at least one year. This is a list State" 2019 list of the top advisors in each state, with the number of ranking spots determined by each state's population and wealth. Other quantitative and qualitative measures include assets under management, revenues generated by advisors for their firms, and the quality of the advisors' practices, regulatory records, internal company documents, and 100-plus points of data provided by the advisors themselves. 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

Barron's "America's Top 1,200

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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

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

"PLANADVISER Top 100

"PLANADVISER Top 100

"PLANADVISER Top 100

2014 list

Retirement Plan Advisers"

Financial Times - "Top 400

Financial Times – "Top 400

Financial Times - "Top 400 Financial Advisers" 2016 list

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 "Best-in-State Wealth

Wealth Advisors 2018 list

Forbes "America's Top Next-

Generation Wealth Advisors"

Forbes' "America's Top

Forbes' "America's Top

Women Wealth Advisors'

Forbes' "America's Top 250

Forbes' "America's Top 250

Wealth Advisors" in 2017

Working Mother/SHOOK

Research's Top Wealth Adviser Moms in 2017

Wealth Advisors" in 2018

2018 list

2017 list

Women Wealth Advisors"

2017 list

Advisors" 2019 list

Advisors" 2018 list

Forbes "Best-in-State Wealth Advisors"

2014 list

2013 list

2017 list

2016 list

2015 list

400 Financial Advisers"

Financial Advisers" 2015 list

Financial Advisers" 2017 list

Financial Advisers" 2018 list

Retirement Plan Advisers"

2017 list

Retirement Plan Advisers"

Under 40" 2016 list

Under 40" 2017 list

Under 40" 2018 list

Under 40" 2019 list

On Wall Street "Top 40 Under 40"

in 2016" list

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Consultants" 2018 list

Financial Advisors" 2013 list

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Financial Advisors: State-bythe "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 State" 2017 list 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-financialadvisors/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 Financial Advisors: State-bythe "America's Top 1,200 Financial Advisors: State-by-State" ranking have a minimum of seven years financial services

advisors/1000/2016.

advisors/1000/2015.

advisors/1000/2014.

Barron's "Top 100 Women Financial Advisors"

prospective client will experience a higher level of performance results, and such rankings should not be construed as an endorsement of the advisor. Source: Barron's "Top 1,200 Financial Advisors" list, March 12, 2018. Advisors considered for the "Top 1,200 Financial Barron's "America's Top 1,200 Financial Advisors: State-by-Advisors" ranking have a minimum of seven years financial services experience and have been employed at their current State" 2018 list 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. 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

www.barrons.com/report/top-financial-advisors/1000/2018.

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,

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://

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 becau 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

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Source: Barron'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. 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 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

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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

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's "Top 40 Advisors Under 40" list, January 2019. The ranking for the "Top 40 Advisors Under 40"

list is compiled using data solicited from the advisors' employers. Advisors considered must be under 40 years old and work at an employee brokerage firm. Individual trailing 12-month production for each advisor was the primary ranking criteria. 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. Rankings and recognition from On Wall Street are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher

\*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.

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\*Source: On Wall Street is a national publication serving the retail brokers and financial services industry. In the January, 2016 issue, On Wall Street published "The Top 40 Advisors Under 40" list, compiled using data solicited from the advisors'

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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

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/awards/top-

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Times (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,

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https://aboutus.ft.com/en-gb/announcements/financial-times-reveal-the-top-401-retirement-advisers-of-2016/.

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" list, February 2019. The ranking for this list by SHOOK Research is based

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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

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

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