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Top Advisor Recognition List Disclosures for Merrill Wealth Management Advisors

Barron's

Barron's "Top 1000 Financial Advisors"
Barron's, "Top 100 Financial Advisors", 2016
Barron's, "Top 100 Financial Advisors", 2015
Barron's, "Top 100 Financial Advisors", 2014
Barron's, "America's Top 100 Financial Advisors", 2013
Barron's, "America's Top 100 Financial Advisors", 2012
Barron's, "America's Top 100 Financial Advisors", 2011

Barron's "America's Top 1,200 Financial Advisors Trade by Trade"
Barron's, "America's Top 1,200 Financial Advisors Trade by Trade", 2011
Barron's, "America's Top 1,200 Financial Advisors Trade by Trade", 2010
Barron's, "America's Top 1,200 Financial Advisors Trade by Trade", 2009

Barron's "America's Top 1,200 Financial Advisors Trade by Trade"
Barron's, "Top 1,200 Financial Advisors", 2008
Barron's, "Top 1,200 Financial Advisors", 2007
Barron's, "Top 1,200 Financial Advisors Trade by Trade", 2006
Barron's, "Top 1,200 Financial Advisors Trade by Trade", 2005

Barron's "Top 100 Women Financial Advisors"
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 100 Women Financial Advisors", 2011
Barron's, "Top 100 Women Financial Advisors", 2010

Barron's "America's Top Retirement Advisors"
Barron's, "America's Top Retirement Advisors", 2010

Barron's "Top 100 Independent Financial Advisors"
Barron's, "Top 100 Independent Financial Advisors", 2016
Barron's, "Top 100 Independent Financial Advisors", 2015

Wealth Management

Wealth Management, "Top 100 Advisors", 2016
Wealth Management, "Top 100 Advisors", 2015

On Wall Street

On Wall Street, "Top 40 Advisors", 2016
On Wall Street, "Top 40 Advisors Under 40", 2016
On Wall Street, "Top 40 Advisors Under 40", 2015
On Wall Street, "Top 40 Advisors", 2015

Financial Times

Financial Times, "Top 400 Financial Advisors"
Financial Times, "Top 400 Financial Advisors", 2016
Financial Times, "Top 400 Financial Advisors", 2015
Financial Times, "Top 400 Financial Advisors", 2014
Financial Times, "Top 400 Financial Advisors", 2013
Financial Times, "Top 400 Financial Advisors", 2012
Financial Times, "Top 400 Financial Advisors", 2011
Financial Times, "Top 400 Financial Advisors", 2010

Financial Times, "Top 401 Retirement Advisors"
Financial Times, "Top 401 Retirement Advisors", 2016
Financial Times, "Top 401 Retirement Advisors", 2015
Financial Times, "Top 401 Retirement Advisors", 2014
Financial Times, "Top 401 Retirement Advisors", 2013
Financial Times, "Top 401 Retirement Advisors", 2012
Financial Times, "Top 401 Retirement Advisors", 2011
Financial Times, "Top 401 Retirement Advisors", 2010

Forbes

Forbes "Best-In-State Wealth Advisors"
Forbes, "Best-In-State Wealth Advisors", 2016
Forbes, "Best-In-State Wealth Advisors", 2015

Forbes "America's Top Wealth Advisors"
Forbes, "America's Top Wealth Advisors", 2016
Forbes, "America's Top Wealth Advisors", 2015

Forbes "America's Top Women Wealth Advisors"
Forbes, "America's Top Women Wealth Advisors", 2016
Forbes, "America's Top Women Wealth Advisors", 2015

Forbes "Top Next-Generation Wealth Advisors"
Forbes, "Top Next-Generation Wealth Advisors", 2016
Forbes, "Top Next-Generation Wealth Advisors", 2015

Working Mother/DIVOR Research

Working Mother/DIVOR Research, "Top Wealth Advisor Moms"
Working Mother/DIVOR Research, "Top Wealth Advisor Moms", 2016
Working Mother/DIVOR Research, "Top Wealth Advisor Moms", 2015

Barron's "Top 100 Financial Advisors"

Barron's, "Top 100 Financial Advisors", 2016

Source: Barron's, "Top 100 Financial Advisors", Sep. 12, 2016. Criteria considered for the "Top 100 Financial Advisors" ranking were a combination of asset gathering, client satisfaction, and a qualitative review of each advisor's practice. Firms could nominate their advisors or could refer clients to the survey. Advisors were also asked to complete a questionnaire. Of the advisors who responded, the number of qualifying client reviews was a factor in determining which advisors were considered for the list. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Barron's. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Barron's participating firms and their affiliates in the finalists' knowledge. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings are recognized from Barron's as a geographical or industry specialist, and not overall. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.barrons.com/page/financial-advisors-faq-0000.html.

Barron's, "America's Top 1,200 Financial Advisors Trade by Trade", 2011

Source: Barron's, "America's Top 1,200 Financial Advisors Trade by Trade", Sep. 12, 2011. Criteria considered were a combination of asset gathering, client satisfaction, and a qualitative review of each advisor's practice. Firms could nominate their advisors or could refer clients to the survey. Advisors were also asked to complete a questionnaire. Of the advisors who responded, the number of qualifying client reviews was a factor in determining which advisors were considered for the list. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Barron's. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Barron's participating firms and their affiliates in the finalists' knowledge. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings are recognized from Barron's as a geographical or industry specialist, and not overall. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.barrons.com/page/financial-advisors-faq-0000.html.

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Barron's, "Top 1,200 Financial Advisors Trade by Trade", 2008

Source: Barron's, "Top 1,200 Financial Advisors Trade by Trade", Sep. 15, 2008. Criteria considered were a combination of asset gathering, client satisfaction, and a qualitative review of each advisor's practice. Firms could nominate their advisors or could refer clients to the survey. Advisors were also asked to complete a questionnaire. Of the advisors who responded, the number of qualifying client reviews was a factor in determining which advisors were considered for the list. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Barron's. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Barron's participating firms and their affiliates in the finalists' knowledge. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings are recognized from Barron's as a geographical or industry specialist, and not overall. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.barrons.com/page/financial-advisors-faq-0000.html.

Barron's, "Top 1,200 Financial Advisors Trade by Trade", 2007

Source: Barron's, "Top 1,200 Financial Advisors Trade by Trade", Sep. 17, 2007. Criteria considered for the Barron's "Top 1,200 Financial Advisors Trade by Trade" ranking were a combination of asset gathering, client satisfaction, and a qualitative review of each advisor's practice. Firms could nominate their advisors or could refer clients to the survey. Advisors were also asked to complete a questionnaire. Of the advisors who responded, the number of qualifying client reviews was a factor in determining which advisors were considered for the list. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Barron's. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Barron's participating firms and their affiliates in the finalists' knowledge. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.barrons.com/page/financial-advisors-faq-0000.html.

Barron's, "America's Top 1,200 Financial Advisors Trade by Trade", 2006

Source: Barron's, "America's Top 1,200 Financial Advisors Trade by Trade", Sep. 18, 2006. Criteria considered were a combination of asset gathering, client satisfaction, and a qualitative review of each advisor's practice. Firms could nominate their advisors or could refer clients to the survey. Advisors were also asked to complete a questionnaire. Of the advisors who responded, the number of qualifying client reviews was a factor in determining which advisors were considered for the list. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Barron's. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Barron's participating firms and their affiliates in the finalists' knowledge. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.barrons.com/page/financial-advisors-faq-0000.html.

Barron's, "America's Top 1,200 Financial Advisors Trade by Trade", 2005

Source: Barron's, "America's Top 1,200 Financial Advisors Trade by Trade", Sep. 19, 2005. Criteria considered were a combination of asset gathering, client satisfaction, and a qualitative review of each advisor's practice. Firms could nominate their advisors or could refer clients to the survey. Advisors were also asked to complete a questionnaire. Of the advisors who responded, the number of qualifying client reviews was a factor in determining which advisors were considered for the list. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Barron's. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Barron's participating firms and their affiliates in the finalists' knowledge. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.barrons.com/page/financial-advisors-faq-0000.html.

Barron's "America's Top 1,200 Financial Advisors Trade by Trade"

Barron's, "America's Top 1,200 Financial Advisors Trade by Trade", 2011

Source: Barron's, "America's Top 1,200 Financial Advisors Trade by Trade", Sep. 12, 2011. Criteria considered were a combination of asset gathering, client satisfaction, and a qualitative review of each advisor's practice. Firms could nominate their advisors or could refer clients to the survey. Advisors were also asked to complete a questionnaire. Of the advisors who responded, the number of qualifying client reviews was a factor in determining which advisors were considered for the list. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Barron's. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Barron's participating firms and their affiliates in the finalists' knowledge. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings are recognized from Barron's as a geographical or industry specialist, and not overall. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.barrons.com/page/financial-advisors-faq-0000.html.

Barron's, "America's Top 1,200 Financial Advisors Trade by Trade", 2010

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Barron's, "America's Top 1,200 Financial Advisors Trade by Trade", 2007

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Barron's "Top 100 Women Financial Advisors"

Barron's, "Top 100 Women Financial Advisors", 2016

Source: Barron's, "Top 100 Women Financial Advisors", June 6, 2016. Criteria considered for the "Top 100 Women Financial Advisors" ranking were a combination of asset gathering, client satisfaction, and a qualitative review of each advisor's practice. Firms could nominate their advisors or could refer clients to the survey. Advisors were also asked to complete a questionnaire. Of the advisors who responded, the number of qualifying client reviews was a factor in determining which advisors were considered for the list. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Barron's. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Barron's participating firms and their affiliates in the finalists' knowledge. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings are recognized from Barron's as a geographical or industry specialist, and not overall. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.barrons.com/page/financial-advisors-faq-0000.html.

Barron's, "Top 100 Women Financial Advisors", 2015

Source: Barron's, "Top 100 Women Financial Advisors", June 8, 2015. Criteria considered for the "Top 100 Women Financial Advisors" ranking were a combination of asset gathering, client satisfaction, and a qualitative review of each advisor's practice. Firms could nominate their advisors or could refer clients to the survey. Advisors were also asked to complete a questionnaire. Of the advisors who responded, the number of qualifying client reviews was a factor in determining which advisors were considered for the list. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Barron's. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Barron's participating firms and their affiliates in the finalists' knowledge. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings are recognized from Barron's as a geographical or industry specialist, and not overall. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.barrons.com/page/financial-advisors-faq-0000.html.

Barron's, "Top 100 Women Financial Advisors", 2014

Source: Barron's, "Top 100 Women Financial Advisors", June 9, 2014. Criteria considered for the "Top 100 Women Financial Advisors" ranking were a combination of asset gathering, client satisfaction, and a qualitative review of each advisor's practice. Firms could nominate their advisors or could refer clients to the survey. Advisors were also asked to complete a questionnaire. Of the advisors who responded, the number of qualifying client reviews was a factor in determining which advisors were considered for the list. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Barron's. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Barron's participating firms and their affiliates in the finalists' knowledge. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings are recognized from Barron's as a geographical or industry specialist, and not overall. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.barrons.com/page/financial-advisors-faq-0000.html.

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

Source: Barron's, "Top 100 Women Financial Advisors", June 10, 2013. Criteria considered for the "Top 100 Women Financial Advisors" ranking were a combination of asset gathering, client satisfaction, and a qualitative review of each advisor's practice. Firms could nominate their advisors or could refer clients to the survey. Advisors were also asked to complete a questionnaire. Of the advisors who responded, the number of qualifying client reviews was a factor in determining which advisors were considered for the list. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Barron's. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Barron's participating firms and their affiliates in the finalists' knowledge. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings are recognized from Barron's as a geographical or industry specialist, and not overall. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.barrons.com/page/financial-advisors-faq-0000.html.

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

Source: Barron's, "Top 100 Women Financial Advisors", June 11, 2012. Criteria considered for the "Top 100 Women Financial Advisors" ranking were a combination of asset gathering, client satisfaction, and a qualitative review of each advisor's practice. Firms could nominate their advisors or could refer clients to the survey. Advisors were also asked to complete a questionnaire. Of the advisors who responded, the number of qualifying client reviews was a factor in determining which advisors were considered for the list. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Barron's. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Barron's participating firms and their affiliates in the finalists' knowledge. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings are recognized from Barron's as a geographical or industry specialist, and not overall. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.barrons.com/page/financial-advisors-faq-0000.html.

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Barron's "Top 50 Institutional Consultants"–GC-BAML Only

Barron's, "Top 50 Institutional Consultants", Oct. 2016

Source: Barron's, "Top 50 Institutional Consultants", Oct. 3, 2016. The criteria in the ranking were compiled in consultation with a panel of industry experts, including consultants, institutional investors, and Barron's editors. Firms could be nominated or identified by those clients. The number of clients served and the number of asset mandates which the respondents recently hired or fired were factored into the ranking. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Barron's. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Barron's participating firms and their affiliates in the finalists' knowledge. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.barrons.com/page/financial-advisors-faq-0000.html.

Barron's, "Top 50 Institutional Consultants", Oct. 2015

Source: Barron's, "Top 50 Institutional Consultants", Oct. 5, 2015. The criteria in the ranking were compiled in consultation with a panel of industry experts, including consultants, institutional investors, and Barron's editors. Firms could be nominated or identified by those clients. The number of clients served and the number of asset mandates which the respondents recently hired or fired were factored into the ranking. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Barron's. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Barron's participating firms and their affiliates in the finalists' knowledge. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.barrons.com/page/financial-advisors-faq-0000.html.

Barron's, "Top 50 Institutional Consultants", Oct. 2014

Source: Barron's, "Top 50 Institutional Consultants", Oct. 6, 2014. The criteria in the ranking were compiled in consultation with a panel of industry experts, including consultants, institutional investors, and Barron's editors. Firms could be nominated or identified by those clients. The number of clients served and the number of asset mandates which the respondents recently hired or fired were factored into the ranking. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Barron's. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Barron's participating firms and their affiliates in the finalists' knowledge. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.barrons.com/page/financial-advisors-faq-0000.html.

Barron's, "Top 50 Institutional Consultants", Oct. 2013

Source: Barron's, "Top 50 Institutional Consultants", Oct. 7, 2013. The criteria in the ranking were compiled in consultation with a panel of industry experts, including consultants, institutional investors, and Barron's editors. Firms could be nominated or identified by those clients. The number of clients served and the number of asset mandates which the respondents recently hired or fired were factored into the ranking. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Barron's. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Barron's participating firms and their affiliates in the finalists' knowledge. Barron's is a trademark of Dow Jones & Company, Inc. All rights reserved. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.barrons.com/page/financial-advisors-faq-0000.html.

Wealth Management "Top 100 Advisors"

Wealth Management "Top 100 Advisors", 2016 (WM-BAML Only)

Source: Wealth Management, "Top 100 Advisors", Sept. 1, 2016. The Top 100 Advisors, ranked by Barron's, is the Wealth Management magazine's "Top 100 Advisors" ranking. Criteria considered for the "Top 100 Advisors" ranking were a combination of asset gathering, client satisfaction, and a qualitative review of each advisor's practice. Firms could nominate their advisors or could refer clients to the survey. Advisors were also asked to complete a questionnaire. Of the advisors who responded, the number of qualifying client reviews was a factor in determining which advisors were considered for the list. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Wealth Management. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Wealth Management participating firms and their affiliates in the finalists' knowledge. Wealth Management is a trademark of Sandhills Publishing Company. All rights reserved. The rankings are based on various factors, including assets under management, revenues generated, client satisfaction, and other factors. For more information, visit https://www.wealthmanagement.com/top-100-advisors/faq.

Wealth Management "Top 100 Advisors", 2015 (WM-BAML Only)

Source: Wealth Management, "Top 100 Advisors", Sept. 1, 2015. The Top 100 Advisors, ranked by Barron's, is the Wealth Management magazine's "Top 100 Advisors" ranking. Criteria considered for the "Top 100 Advisors" ranking were a combination of asset gathering, client satisfaction, and a qualitative review of each advisor's practice. Firms could nominate their advisors or could refer clients to the survey. Advisors were also asked to complete a questionnaire. Of the advisors who responded, the number of qualifying client reviews was a factor in determining which advisors were considered for the list. Quantitative and qualitative measures were used to determine the finalists, which were then reviewed and ranked by a panel of financial services experts, and the team broadcast journalists at Wealth Management. The ranking is a snapshot of the financial services landscape, as Wall Street advisor rankings are in constant flux. Merrill Lynch Wealth Management (MLWM) financial advisors participating firms and their affiliates, to the finalists' knowledge, were not asked to provide information for this ranking. Merrill Lynch does not customarily pay a fee in connection with this ranking. Merrill Lynch does not receive compensation from Wealth Management particip