MERRILL Barron's Barron's "Top 100 Financial Advisors" Barron's "Top 100 Financial Advisors" 2019 Barron's "Top 100 Financial Advisors" 2018 Barron's "America's Top 100 Financial Advisors" 2017 Barron's "America's Top 100 Financial Advisors" 2016 Barron's "America's Top 100 Financial Advisors" 2015 Barron's "America's Top 100 Financial Advisors" 2014 Barron's "America's Top 100 Financial Advisors" 2013 Barron's "America's Top 100 Financial Advisors" 2012 Barron's "America's Top 1,000 Financial Advisors: State-by-State" Barron's "America's Top 1,000 Financial Advisors: State-by-State" 2013 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 Barron's "Top 1,200 Financial Advisors: State-by-State" Barron's "Top 1,200 Financial Advisors" 2019

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State-by-State" 2017

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State-by-State" 2014

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Barron's "Top 100 Women Financial Advisors"

Barron's "Top 100 Women Financial Advisors" 2019

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Barron's Top Institutional Consultants

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Barron's "America's Top 1,000

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

endorsement of the advisor.

advisors/1000/2017.

advisors/1000/2016.

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of the advisor.

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

Financial Advisors: State-by-

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Barron's "America's Top 1,200

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Barron's "Top 100 Women

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Forbes' "Top Next-Generation Wealth Advisors" 2018 list

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Forbes' "America's Top

Forbes' "America's Top

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Forbes' "America's Top Wealth Advisors" 2019

Forbes' "America's Top 250

Forbes' "America's Top 250

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Working Mother/SHOOK

Research's "Top Wealth

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Working Mother/SHOOK

Research's "Top Wealth

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Forbes' "Best-in-State Wealth Advisors"

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On Wall Street On Wall Street-"Top 40 Advisors Under 40" 2019 On Wall Street-"Top 40 Advisors Under 40" 2018

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Financial Times-"Top 401 Retirement Advisers" Financial Times-"Top 401 Retirement Advisers" 2019

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Working Mother/SHOOK Research

Working Mother/SHOOK Research's "Top Wealth Advisor

Working Mother/SHOOK Research's "Top Wealth Advisor

Working Mother/SHOOK Research's "Top Wealth Advisor

Forbes

Moms" 2018

Moms" 2017

Source: Barron's "Top 100 Financial Advisors" list, April 20, 2019. Advisors considered for the "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 of 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 of 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

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

Top 100 Financial Advisors' list ranking have a minimum of seven of 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

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

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

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

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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 of 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

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

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 of financial services experience and

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 of 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 11, 2019. The ranking considered advisors with a minimum of

seven years of financial services experience and have been employed at their current firm for at least one year. 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. 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 prospective client will experience a higher level of performance results, and such rankings should not be construed as an

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

for the "America's Top 1,200 Financial Advisors: State-by-State" ranking have a minimum of seven years of 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-

Source: Barron's "America's Top 1,200 Financial Advisors: State-by-State" list, March 7, 2016. Advisors considered for the "America's Top 1,200 Financial Advisors: State-by-State" ranking have a minimum of seven years of 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-

Source: Barron's "America's Top 1,200 Financial Advisors: State-by-State" list, February 23, 2015. Advisors considered for the "America's Top 1,200 Financial Advisors: State-by-State" ranking have a minimum of seven years of 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-

Source: Barron's "America's Top 1,200 Financial Advisors: State-by-State" list, February 24 , 2014. Advisors considered for the "America's Top 1,200 Financial Advisors: State-by-State" ranking have a minimum of seven years of 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 $future\ performance\ or\ investment\ outcome.\ For\ more\ information,\ visit\ https://www.barrons.com/report/top-financial-investment\ outcome.\ For\ more\ outcome.\ For\ mor$

Source: Barron's "Top 100 Women Financial Advisors" list, June 8, 2019. Advisors considered for the "Top 100 Women Financial Advisors" list ranking have a minimum of seven years of 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

Source: Barron's "Top 100 Women Financial Advisors" list, June 11, 2018. Advisors considered for the "Top 100 Women

Source: Barron's "Top 100 Women Financial Advisors" list, June 5, 2017. Advisors considered for the "Top 100 Women

Source: Barron's "Top 100 Women Financial Advisors" list, June 6, 2016. Advisors considered for the "Top 100 Women

Source: Barron's "Top 100 Women Financial Advisors" list, June 7, 2015. Advisors considered for the "Top 100 Women

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 of 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

Source: Barron's "Top 100 Women Financial Advisors" list, June 4, 2012. Advisors considered for the "Top 100 Women

Source: Barron's "Top 50 Institutional Consultants" list, April 20, 2019. 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

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

Source: Each member of the Hall of Fame has appeared in 10 or more of Barron's annual Top 100 Advisor rankings. Advisors considered for the Top 100 Financial Advisors rankings 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

Source: Wealth Management Magazine, May 1, 2016, "Top 100 Wirehouse Advisors in 2016" list. Advisors on the Wealth

Management magazine "Top 100 Wirehouse Advisors in 2016" list are ranked exclusively by assets under management

custodied at the four wirehouse firms. Only advisors for whom 80% 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

Source: Wealth Management Magazine, May 3, 2015, "Top 100 Wirehouse Advisors in 2015" list. Advisors on the Wealth

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custodied at the four wirehouse firms. Only advisors for whom 80% 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.com/rankings/top-100-

*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,

Source: The Financial Times "Top 400 Financial Advisers" (FT 400) list is an independent listing produced by the Financial Times (April 2019). The FT 400 is based on data gathered from firms and verified by broker-dealer home offices,

regulatory disclosures, and the FT's research. The listing reflects each advisor's performance in six primary areas, including assets under management, asset growth, compliance record, experience, credentials and accessibility as identified by the FT. Neither the brokerages nor the advisors pay a fee to the Financial Times in exchange for inclusion in the FT 400. Rankings and recognition from Financial Times 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

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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-

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

research. The listing reflects each adviser's status in six primary areas: DC plan assets under management, DC plan growth rate, specialization in DC plans, years of experience, advanced industry credentials and compliance record. This honor is not indicative of the adviser's future performance. Neither the advisers nor their parent firms pay a fee to the Financial Times in exchange for inclusion in the FT 401. All rights reserved. Rankings and recognition from the Financial Times are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher level

Source: The Financial Times "Top 401 Retirement Advisers" list (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 five primary areas, including Defined Contribution (DC) assets under management (AUM), specialization in the DC business, growth in DC plan

business, years of experience advising DC plans and compliance record. Rankings are based on the opinions of Financial Times and not representative nor indicative of any one client's experience, future performance or investment outcome and should not be construed as an endorsement of the advisor. For more information, visit https://www.ft.com/reports/

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

(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/.

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 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/.

Source: Forbes', "Best-in-State Wealth Advisors" list, February 2019. The ranking for this list by SHOOK Research is based

on 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. Forbes is a trademark of Forbes Media LLC. All rights reserved. Rankings and recognition from Forbes/SHOOK Research 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

Source: Forbes' "Best-in-State Wealth Advisors" ranking in February 2018 was developed by SHOOK Research and is

more information, visit https://www.forbes.com/best-in-state-wealth-advisors/#d7e9673291d1.

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

Source: Forbes' "Top Next-Generation Wealth Advisors" list Forbes' "Top Next-Generation Wealth Advisors" list, July 24, 2019,

was developed by SHOOK Research. Advisors considered for this ranking were born in 1980 or later with a minimum of four years of 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. Rankings and recognition from Forbes are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher level of performance results, and such rankings should not be construed as an

Source: Forbes' "Top Next-Generation Wealth Advisors" list, July 25, 2018, was developed by SHOOK Research. Advisors

Source: Forbes' "Top Next-Generation Wealth Advisors" list, July 25, 2017, was developed by SHOOK Research. Advisors

Source: Forbes "America's Top Women Wealth Advisors" list, April 30, 2019. Forbes' "America's Top Women Wealth

and a ranking algorithm that includes: client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC and not representative nor indicative of any one client's experience, future performance, or investment outcome. Neither Forbes nor SHOOK Research receives compensation in exchange for placement on the ranking. Forbes is a trademark of Forbes Media LLC. All rights reserved. Rankings and recognition from Forbes are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher level of performance results, and such rankings should

Advisors" ranking was developed by SHOOK Research and is based on in-person and telephone due diligence meetings

Source: Forbes' "America's Top Women Wealth Advisors" ranking, May 1, 2018, was developed by SHOOK Research and is

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

experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC and not representative nor indicative of any one client's experience, future performance, or investment outcome. Neither Forbes nor SHOOK Research receives compensation in exchange for placement on the ranking. 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, February 28, 2017, was developed by SHOOK Research and

Source: Forbes' Magazine (September, 2019). Data provided by SHOOK™ Research, LLC. Data as of 6/30/19. The Forbes

ranking of "America's Top 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. Rankings are based on the opinions of Forbes and not representative nor indicative of any one client's experience, future performance, or investment outcome. Rankings and recognition from Forbes are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher level of performance results, and such rankings should not be construed as an endorsement of the advisor. Neither Forbes nor

Source: The Forbes' (September 12, 2018) ranking of "America's Top 250 Wealth Advisors," developed by SHOOK Research,

Source: The Forbes' (September 26, 2017) ranking of "America's Top 250 Wealth Advisors", developed by SHOOK Research,

Source: Working Mother/SHOOK Research's "Top Wealth Advisor Moms" list, October 3, 2019. Data provided by SHOOK™

Research, LLC. Data as of 3/31/19. SHOOK™ Research considered Wealth Advisors who are mothers with children living at

home and under the age of 21. Ranking algorithm is based on qualitative measures derived from telephone and in-person interviews and surveys: service models, investing process, client retention, industry experience, review of compliance records, firm nominations, etc.; and quantitative criteria, such as assets under management and revenue generated for

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 www.SHOOKresearch.com. All rights reserved. Rankings and recognition from Working Mother/ SHOOK Research 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

Source: The Working Mother/SHOOK Research's "Top Wealth Advisor Moms" list considers wealth advisors who are

mothers with children living at home and under the age of 18 (Sept 2018). The ranking algorithm is based on qualitative measures derived from 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. Rankings are based on the opinions of Working Mother and not representative nor indicative of any one client's experience, future performance or investment outcome and should not be construed as an endorsement of the advisor. For more information, visit https://www.workingmother.com/top-wealth-Advisor-

Source: For Working Mother/SHOOK Research's "Top Wealth Adviser Moms" list, October 3, 2017, SHOOK™ Research

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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 receives 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-

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Forbes' "America's Top Women Wealth Advisors"

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the advisor.

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advisors/#1f3a74b251f4.

Forbes' "America's Top Wealth Advisors"

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

Times, October 10, 2019. The FT 401 is based on data gathered from advisers, regulatory disclosures and the FT's

of performance results, and such rankings should not be construed as an endorsement of the adviser.

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, 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

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2016 issue, On Wall Street published "Top 40 Advisors Under 40" list, compiled using data solicited from the advisors' employers. Individual trailing 12-month production for each advisor was the primary ranking criteria. The ranking or ratings shown here may not be representative of all client experiences because they reflect an average or sampling of the client experiences. These rankings or ratings are not indicative of any future performance or investment outcome. For

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

level of performance results, and such rankings should not be construed as an endorsement of the advisor.

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/

www.barrons.com/articles/where-the-big-money-gets-its-advice-1492233216.

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.

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times-announces-top-400-us-advisors-of-2013/.

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On Wall Street "Top 40 Advisors Under 40"

Financial Times-"Top 400 Financial Advisers"

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Advisors" ranking have a minimum of seven years of 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. 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://

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Top 1,000 Financial Advisors: State-by-State" ranking have a minimum of seven years of financial services experience and

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Financial Times-"Top 400 Financial Advisers"