MERRILL

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Top Advisor Recognition List and Bank of America Corporation Award Disclosures for Merrill Wealth Management Advisors

Barron's Barron's "Top 100 Financial Advisors" Barron's "Top 100 Financial Advisors" Multi-Year lists Published annually Mar – May. Rankings based on data as of December 31 of prior year. Barron's "Top 100 Financial Advisors" 2024 Published on May 10, 2024. Rankings based on data as of December 31, 2023. Barron's "Top 100 Financial Advisors" 2023 Published on April 14, 2023. Rankings based on data as of December 31, 2022. Barron's "Top 100 Financial Advisors" 2022 Published on April 15, 2022. Rankings based on data as of December 31, 2021. Barron's "Top 100 Financial Advisors" 2021 Published on April 16, 2021. Rankings based on data as of December 31, 2020. Barron's "Top 100 Financial Advisors" 2020 Published on April 17, 2020. Rankings based on data as of December 31, 2019. Barron's "Top 100 Financial Advisors" 2019 Published on April 20, 2019. Rankings based on data as of December 31, 2018. Barron's "Top 100 Financial Advisors" 2018 Published on April 23, 2018. Rankings based on data as of December 31, 2017. Barron's "Top 100 Financial Advisors" 2017 Published on April 17, 2017. Rankings based on data as of December 31, 2016. Barron's "Top 100 Financial Advisors" 2016 Published on April 18, 2016. Rankings based on data as of December 31, 2015. Barron's "Top 100 Financial Advisors" 2015 Published on March 23, 2015. Rankings based on data as of December 31, 2014. Barron's "Top 100 Financial Advisors" 2014 Published on April 24, 2014. Rankings based on data as of December 31, 2013. Barron's "Top 100 Financial Advisors" 2013 Published on April 25, 2013. Rankings based on data as of December 31, 2012. Barron's "Top 100 Financial Advisors" 2012 Published on April 16, 2012. Rankings based on data as of December 31, 2011. Barron's "Top 100 Financial Advisors" 2010 Published on April 19, 2010. Rankings based on data as of December 31, 2009. Barron's "Top 100 Financial Advisors" 2009 Published on April 20, 2009. Rankings based on data as of December 31, 2008. Barron's "Top 100 Financial Advisors" 2007 Published on April 23, 2007. Rankings based on data as of December 31, 2006. Barron's "America's Top 1,000 Financial Advisors: State-by-State" Barron's "America's Top 1,000 Financial Advisors: State-by-State" Multi-Year lists Published annually in February. Rankings based on data as of September 30 of prior year. Barron's "America's Top 1,000 Financial Advisors: State-by-State" 2013 Published on February 18, 2013. Rankings based on data as of September 30, 2012. Barron's "America's Top 1,000 Financial Advisors: State-by-State" 2012 Published on February 20, 2012. Rankings based on data as of September 30, 2011. *Barron's* "America's Top 1,000 Financial Advisors: State-by-State" 2011 Published on February 21, 2011. Rankings based on data as of September 30, 2010. Barron's "America's Top 1,000 Financial Advisors: State-by-State" 2010 Published on February 22, 2010. Rankings based on data as of September 30, 2009. Barron's "America's Top 1,000 Financial Advisors: State-by-State" 2009 Published on February 9, 2009. Rankings based on data as of September 30, 2008. Barron's "Top 1,200 Financial Advisors" Barron's "Top 1,200 Financial Advisors" Multi-Year lists Published annually February – March. Rankings based on data as of September 30 of prior year. Barron's "Top 1,200 Financial Advisors" 2024 Published on March 8, 2024. Rankings based on data as of September 30, 2023. Barron's "Top 1,200 Financial Advisors" 2023 Published on March 10, 2023. Rankings based on data as of September 30, 2022. Barron's "Top 1,200 Financial Advisors" 2022 Published on March 11, 2022. Rankings based on data as of September 30, 2021. Barron's "Top 1,200 Financial Advisors" 2021 Published on March 12, 2021. Rankings based on data as of September 30, 2020. Barron's "Top 1,200 Financial Advisors" 2020 Published on March 13, 2020. Rankings based on data as of September 30, 2019. Barron's "Top 1,200 Financial Advisors" 2019 Published on March 11, 2019. Rankings based on data as of September 30, 2018. Barron's "Top 1,200 Financial Advisors" 2018 Published on March 12, 2018. Rankings based on data as of September 30, 2017. Barron's "Top 1,200 Financial Advisors" 2017 Published on March 6, 2017. Rankings based on data as of September 30, 2016. Barron's "Top 1,200 Financial Advisors" 2016 Published on March 7, 2016. Rankings based on data as of September 30, 2015. Barron's "Top 1,200 Financial Advisors" 2015 Published on February 23, 2015. Rankings based on data as of September 30, 2014. Barron's "Top 1,200 Financial Advisors" 2014 Published on February 24, 2014. Rankings based on data as of September 30, 2013. Barron's "Top 100 Women Financial Advisors" Barron's "Top 100 Women Financial Advisors" Multi-Year lists Published annually June – July. Rankings based on data as of March 31 of current year. Barron's "Top 100 Women Financial Advisors" 2024 Published on July 19, 2024. Rankings based on data as of March 31, 2024. Barron's "Top 100 Women Financial Advisors" 2023 Published on June 16, 2023. Rankings based on data as of March 31, 2023. Barron's "Top 100 Women Financial Advisors" 2022 Published on June 17, 2022. Rankings based on data as of March 31, 2022. Barron's "Top 100 Women Financial Advisors" 2021 Published on June 18, 2021. Rankings based on data as of March 31, 2021. Barron's "Top 100 Women Financial Advisors" 2020 Published on June 17, 2020. Rankings based on data as of March 31, 2020. Barron's "Top 100 Women Financial Advisors" 2019 Published on June 8, 2019. Rankings based on data as of March 31, 2019. Barron's "Top 100 Women Financial Advisors" 2018 Published on June 11, 2018. Rankings based on data as of March 31, 2018. Barron's "Top 100 Women Financial Advisors" 2017 Published on June 5, 2017. Rankings based on data as of March 31, 2017. Barron's "Top 100 Women Financial Advisors" 2016 Published on June 5, 2016. Rankings based on data as of March 31, 2016. Barron's "Top 100 Women Financial Advisors" 2015 Published on June 7, 2015. Rankings based on data as of March 31, 2015. Barron's "Top 100 Women Financial Advisors" 2014 Published on June 9, 2014. Rankings based on data as of March 31, 2014. Barron's "Top 100 Women Financial Advisors" 2013 Published on June 10, 2013. Rankings based on data as of March 31, 2013. Barron's "Top 100 Women Financial Advisors" 2012 Published on June 4, 2012. Rankings based on data as of March 31, 2012. Barron's Top Institutional Consulting Teams Barron's "Top 100 Institutional Consulting Teams" Multi-Year lists Published annually in April-May. Rankings based on data as of December 31 of prior year. Barron's "Top 100 Institutional Consulting Teams" 2024 Published on May 10, 2024. Rankings based on data as of December 31, 2023. Barron's "Top 100 Institutional Consulting Teams" 2023 Published on April 14, 2023. Rankings based on data as of December 31, 2022. Barron's "Top 100 Institutional Consulting Teams" 2022 Published on April 15, 2022. Rankings based on data as of December 31, 2021. Barron's "Top 100 Institutional Consulting Teams" 2021 Published on April 16, 2021. Rankings based on data as of December 31, 2020. Barron's "Top 50 Institutional Consulting Teams" Multi-Year lists Published annually in April. Ranking based on data as of December 31 of prior year. Barron's "Top 50 Institutional Consulting Teams" 2020 Published on April 17, 2020. Rankings based on data as of December 31, 2019. Barron's "Top 50 Institutional Consultants" 2019 Published on April 20, 2019. Rankings based on data as of December 31, 2018. Barron's "Top 50 Institutional Consultants" 2018 Published on April 23, 2018. Rankings based on data as of December 31, 2017. Barron's "Top 30 Institutional Consultants" Multi-Year lists Published annually in April. Rankings based on data as of December 31 of prior year. Barron's "Top 30 Institutional Consultants" 2017 Published on April 17, 2017. Rankings based on data as of December 31, 2016. Barron's "Top 30 Institutional Consultants" 2016 Published on April 16, 2016. Rankings based on data as of December 31, 2015. Barron's "Top 30 Institutional Consultants" 2015 Published on April 18, 2015. Rankings based on data as of December 31, 2014. Barron's "Hall of Fame"

Forbes Forbes "Best-in-State Wealth Management Teams" Forbes "Best-in-State Wealth Management Teams" Multi-Year lists Published annually in January. Rankings based on data as of March 31 of prior year. Forbes "Best-in-State Wealth Management Teams" 2024 Published on January 9, 2024. Rankings based on data as of March 31, 2023. Forbes "Best-in-State Wealth Management Teams" 2023 Published on January 12, 2023. Rankings based on data as of March 31, 2022. Forbes "Best-in-State Wealth Advisors" Forbes "Best-in-State Wealth Advisors" Multi-Year lists Published annually Jan – April. Rankings based on data as of June 30 of prior year. Forbes "Best-in-State Wealth Advisors" 2024 Published on April 3, 2024. Rankings based on data as of June 30, 2023. Forbes "Best-in-State Wealth Advisors" 2023 Published on April 4, 2023. Rankings based on data as of June 30, 2022. Forbes "Best-in-State Wealth Advisors" 2022 Published on April 7, 2022. Rankings based on data as of June 30, 2021. Forbes "Best-in-State Wealth Advisors" 2021 Published on February 11, 2021. Rankings based on data as of June 30, 2020. Forbes "Best-in-State Wealth Advisors" 2020 Published on January 16, 2020. Rankings based on data as of June 30, 2019. Forbes "Best-in-State Wealth Advisors" 2019 Published on February 20, 2019. Rankings based on data as of June 30, 2018. Forbes "Best-in-State Wealth Advisors" 2018 Published on February 15, 2018. Rankings based on data as of June 30, 2017. Forbes "America's Top Next-Generation Wealth Advisors" Forbes "America's Top Next-Generation Wealth Advisors" Multi-Year lists Published annually July – Sept. Rankings based on data as of March 31 of current year. Forbes "America's Top Next-Generation Wealth Advisors" 2024 Published on August 8, 2024. Rankings based on data as of March 31, 2024. Forbes "America's Top Next-Generation Wealth Advisors" 2023 Published on August 8, 2023. Rankings based on data as of March 31, 2023. Forbes "America's Top Next-Generation Wealth Advisors" 2022 Published on August 3, 2022. Rankings based on data as of March 31, 2022. Forbes "America's Top Next-Generation Wealth Advisors" 2021 Published on September 21, 2021. Rankings based on data as of March 31, 2021. Forbes "America's Top Next-Generation Wealth Advisors" 2020 Published on July 22, 2020. Rankings based on data as of March 31, 2020. Forbes "America's Top Next-Generation Wealth Advisors" 2019 Published on July 24, 2019. Rankings based on data as of March 31, 2019. Forbes "America's Top Next-Generation Wealth Advisors" 2018 Published on July 25, 2018. Rankings based on data as of March 31, 2018. Forbes "America's Top Next-Generation Wealth Advisors" 2017 Published on July 25, 2017. Rankings based on data as of March 31, 2017. Forbes "Top Next-Generation Wealth Advisors Best-in-State" Forbes "Top Next-Generation Wealth Advisors Best-in-State" Multi-Year lists Published annually Aug – Sept. Rankings based on data as of March 31 of current year. Forbes "Top Next-Generation Wealth Advisors Best-in-State" 2024 list Published on August 8, 2024. Rankings based on data as of March 31, 2024. Forbes "Top Next-Generation Wealth Advisors Best-in-State" 2023 list Published on August 8, 2023. Rankings based on data as of March 31, 2023. Forbes "Top Next-Generation Wealth Advisors Best-in-State" 2022 list Published on August 3, 2022. Rankings based on data as of March 31, 2022. Forbes "Top Next-Generation Wealth Advisors Best-in-State" 2019 list Published on September 4, 2019. Rankings based on data as of March 31, 2019. Forbes "America's Top Wealth Management Teams High Net Worth" Forbes "America's Top Wealth Management Teams High Net Worth" Multi-Year lists Published annually in November. Rankings based on data as of March 31 of current year. Forbes "America's Top Wealth Management Teams High Net Worth" 2023 Published on November 7, 2023. Rankings based on data as of March 31, 2023. Forbes "America's Top Wealth Management Teams High Net Worth" 2022 Published on November 8, 2022. Rankings based on data as of March 31, 2022. Forbes "America's Top Wealth Management Teams **Private Wealth**" Forbes "America's Top Wealth Management Teams Private Wealth" Multi-Year lists Published annually in November. Rankings based on data as of March 31 of current year. Forbes "America's Top Wealth Management Teams Private Wealth" 2023 Published on November 7, 2023. Rankings based on data as of March 31, 2023. Forbes "America's Top Wealth Management Teams Private Wealth" 2022 Published on November 8, 2022. Rankings based on data as of March 31, 2022. Forbes "America's Top Women Wealth Advisors" Forbes "America's Top Women Wealth Advisors" Multi-Year lists Published annually Feb – April. Rankings based on data as of June 30 – September 30 of prior year. Forbes "America's Top Women Wealth Advisors" 2024 Published on February 8, 2024. Rankings based on data as of Sept 30, 2023. Forbes "America's Top Women Wealth Advisors" 2023 Published on February 2, 2023. Rankings based on data as of Sept 30, 2022. Forbes "America's Top Women Wealth Advisors" 2022 Published on February 4, 2022. Rankings based on data as of Sept 30, 2021. Forbes "America's Top Women Wealth Advisors" 2021 Published on March 24, 2021. Rankings based on data as of Sept 30, 2020. Forbes "America's Top Women Wealth Advisors" 2020 Published on April 21, 2020. Rankings based on data as of Sept 30, 2019. Forbes "America's Top Women Wealth Advisors" 2019 Published on April 30, 2019. Rankings based on data as of Sept 30, 2018. Forbes "America's Top Women Wealth Advisors" 2018 Published on February 15, 2018. Rankings based on data as of Sept 30, 2017. Forbes "America's Top Women Wealth Advisors" 2017 Published on February 28, 2017. Rankings based on data as of June 30, 2016. Forbes "Top Women Wealth Advisors Best-in-State" Forbes "Top Women Wealth Advisors Best-in-State" Multi-Year lists Published annually in February. Rankings based on data as of Sept 30 of prior year. Forbes "Top Women Wealth Advisors Best-in-State" 2024 Published on February 8, 2024. Rankings based on data as of Sept 30, 2023. Forbes "Top Women Wealth Advisors Best-in-State" 2023 Published on February 2, 2023. Rankings based on data as of Sept 30, 2022. Forbes "Top Women Wealth Advisors Best-in-State" 2022 Published on February 4, 2022. Rankings based on data as of Sept 30, 2021. Forbes "America's Top Wealth Advisors" Forbes "America's Top Wealth Advisors" Multi-Year lists Published in April 2023-2024. Rankings based on data as of June of the previous year. Years pre-dating 2023, published annually Aug – Oct. Rankings based on data as of March – June of current year. Forbes "America's Top Wealth Advisors" 2024 Published on April 3, 2024. Rankings based on data as of June 30, 2023. Forbes "America's Top Wealth Advisors" 2023 Published on April 4, 2023. Rankings based on data as of June 30, 2022. Forbes "America's Top Wealth Advisors" 2022 Published on August 24, 2022. Rankings based on data as of Mar 31, 2022. Forbes "America's Top Wealth Advisors" 2021 Published on August 24, 2021. Rankings based on data as of Mar 31, 2021. Forbes "America's Top Wealth Advisors" 2020 Published on August 25, 2020. Rankings based on data as of Mar 31, 2020. Forbes "America's Top Wealth Advisors" 2019 Published on September 10, 2019. Rankings based on data as of June 30, 2019. Forbes "America's Top Wealth Advisors" 2018 Published on September 12, 2018. Rankings based on data as of June 30, 2018. Forbes "America's Top Wealth Advisors" 2017 Published on October 24, 2017. Rankings based on data as of June 30, 2017. On Wall Street On Wall Street "Top 40 Advisors Under 40" Multi-Year lists Published annually Jan – Dec. Rankings based on data as of Sept 30 – Dec 31 of prior year. On Wall Street "Top 40 Advisors Under 40" 2020 Published on January 23, 2020. Rankings based on data as of Sept 30, 2019. On Wall Street "Top 40 Advisors Under 40" 2019 Published on February 1, 2019. Rankings based on data as of Dec 31, 2018. On Wall Street "Top 40 Advisors Under 40" 2018 Published on January 16, 2018. Rankings based on data as of Sept 30, 2017. On Wall Street "Top 40 Advisors Under 40" 2017 Published on March 30, 2017. Rankings based on data as of Sept 30, 2016. On Wall Street "Top 40 Advisors Under 40" 2016 Published on February 10, 2016. Rankings based on data as of Sept 30, 2015. On Wall Street "Top 40 Advisors Under 40" 2015 Published on June 29, 2015. Rankings based on data as of Sept. 30, 2014. On Wall Street "Top 40 Advisors Under 40" 2014 Published on January 14, 2014. Rankings based on data as of Sept. 30, 2013. On Wall Street "Top 40 Advisors Under 40" 2013 Published on February 3, 2013. Rankings based on data as of Sept. 30, 2012. On Wall Street "Top 40 Advisors Under 40" 2012 Published on November 25, 2012. Rankings based on data as of Sept. 30, 2011. On Wall Street "Top 40 Advisors Under 40" 2011 Published on November 28, 2011. Rankings based on data as of Sept. 30, 2010. On Wall Street "Top 40 Advisors Under 40" 2010 Published on December 1, 2010. Rankings based on data as of Sept. 30, 2009. Working Mother/SHOOK Research

Published throughout 2020. Rankings based on data current list. Barron's "Hall of Fame" 2019 Published throughout 2019. Rankings based on data current list. Barron's "Top 250 Private Wealth Management Teams" Barron's "Top 250 Private Wealth Management Teams" **Multi-Year lists** Published annually in May. Years pre-dating 2024, published as Barron's "Top 100 Private Wealth Management Teams" list annually in April. Rankings based on data as of December 31 of prior year. Barron's "Top 250 Private Wealth Management Teams" 2024 Published on May 10, 2024. Rankings based on data as of December 31, 2023. Barron's "Top 100 Private Wealth Management Teams" Barron's "Top 100 Private Wealth Management Teams" Multi-Year lists Published annually in April. Rankings based on data as of December 31 of prior year.

Published throughout 2022. Rankings based on data current list.

Published throughout 2021. Rankings based on data current list.

Barron's "Hall of Fame" 2022

Barron's "Hall of Fame" 2021

Barron's "Hall of Fame" 2020

Barron's "Top 100 Private Wealth Management Teams" 2023
Published on April 14, 2023. Rankings based on data as of December 31, 2022.
Barron's "Top 100 Private Wealth Management Teams" 2022
Published on April 15, 2022. Rankings based on data as of December 31, 2021.
Barron's "Top 100 Private Wealth Management Teams" 2021
Published on April 16, 2021. Rankings based on data as of December 31, 2020.
Barron's "Top 50 Private Wealth Management Teams"
Barron's "Top 50 Private Wealth Management Teams"
Multi-Year lists

Published annually in April. Rankings based on data as of December 31 of prior year.

Barron's "Top 50 Private Wealth Management Teams" 2020
Published on April 17. 2020. Rankings based on data as of December 31, 2019.
Barron's "Top 50 Private Wealth Management Teams" 2019
Published on April 17. 2019. Rankings based on data as of December 31, 2018.

Financial Planning Financial Planning's **"Top 40 Brokers Under 40"** Financial Planning's **"Top 40 Brokers Under 40" Multi-Year lists** Published annually in Q1. Rankings based on data as of Sept 30 of

prior year.
Financial Planning's "Top 40 Brokers Under 40" 2024 Published on February 6, 2024. Rankings based on data as of Sept 30, 2023.
Financial Planning's "Top 40 Brokers Under 40" 2023 Published on February 1, 2023. Rankings based on data as of Sept 30, 2022.
Financial Planning's "Top 40 Brokers Under 40" 2022 Published on February 1, 2022. Rankings based on data as of Sept 30, 2021.
Financial Planning's "Top 40 Advisors Under 40" 2021 Published on January 26, 2021. Rankings based on data as of Sept 30, 2020.

Financial Times

Financial Times **"400 Top Financial Advisers" Financial Times "400 Top Financial Advisers" Multi-Year lists** Published annually Mar – April. Rankings based on data as of June 30 of prior year.

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Financial Times "400 Top Financial Advisers" 2020 Published on April 16, 2020. Rankings based on data as of June 30, 2019.
Financial Times "400 Top Financial Advisers" 2019 Published on April 18, 2019. Rankings based on data as of June 30, 2018.
Financial Times "400 Top Financial Advisers" 2018 Published on March 22, 2018. Rankings based on data as of June 30, 2017.
Financial Times "400 Top Financial Advisers" 2017 Published on March 30, 2017. Rankings based on data as of June 30, 2016.
Financial Times "400 Top Financial Advisers" 2016 Published on March 30, 2016. Rankings based on data as of June 30, 2015.
Financial Times "400 Top Financial Advisers" 2015 Published on March 25, 2015. Rankings based on data as of June 30, 2014.
Financial Times "400 Top Financial Advisers" 2014 Published on March 25, 2014. Rankings based on data as of June 30, 2013.
Financial Times "400 Top Financial Advisers" 2013 Published on April 11, 2013. Rankings based on data as of June 30, 2012.
Financial Times "401 Top Retirement Advisers"

Financial Times "401 Top Retirement Advisers" Multi-Year lists Published annually May – Oct. Rankings based on data as of Dec 31 of prior year.

Financial Times "401 Top Retirement Advisers" 2020
Published on October 22, 2020. Rankings based on data as of Dec 31, 2019.
Financial Times "401 Top Retirement Advisers" 2019
Published on October 10, 2019. Rankings based on data as of Dec 31, 2018.
Financial Times "401 Top Retirement Advisers" 2018
Published on September 27, 2018. Rankings based on data as of Dec 31, 2017.
Financial Times "401 Top Retirement Advisers" 2017
Published on September 27, 2017. Rankings based on data as of Dec 31, 2016.
Financial Times "401 Top Retirement Advisers" 2016
Published on September 15, 2016. Rankings based on data as of Dec 31, 2015.
Financial Times "401 Top Retirement Advisers" 2015
Published on May 28, 2015. Rankings based on data as of Dec 31, 2014.

Working Mother/SHOOK Research's "Top Wealth Advisor Moms" 2020 Published on September 29, 2020. Rankings based on data as of Mar 31, 2020. Working Mother/SHOOK Research's "Top Wealth Advisor Moms" 2019

Published on October 12, 2021. Rankings based on data as of Mar 31, 2021.

Working Mother/SHOOK Research's "Top Wealth Advisor

Published annually Sept – Oct. Rankings based on data as of Mar 31

Working Mother/SHOOK Research's "Top Wealth Advisor

Moms" Multi-Year lists

of current year.

Moms" 2021

Moms" 2019 Published on October 3, 2019. Rankings based on data as of Mar 31, 2019. Working Mother/SHOOK Research's "Top Wealth Advisor

Moms" 2018 Published on October 2, 2018. Rankings based on data as of Mar 31, 2018. Working Mother/SHOOK Research's "Top Wealth Advisor Moms" 2017

Published on October 3, 2017. Rankings based on data as of Mar 31, 2017.

Bank of America Corporation's David Brady Community Service Award

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Bank of America Corporation's David Brady Community Service Award, 2023
Bank of America Corporation's David Brady Community Service Award, 2022
Bank of America Corporation's David Brady Community Service Award, 2021
Bank of America Corporation's David Brady Community Service Award, 2020
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Bank of America Corporation's David Brady Community Service Award, 2007

Bank of America Corporation's Diversity & Inclusion Award

Bank of America Corporation's Diversity & Inclusion Award, 2023 Bank of America Corporation's Diversity & Inclusion Award, 2022 Bank of America Corporation's Diversity & Inclusion Award, 2021 Bank of America Corporation's Diversity & Inclusion Award, 2020

Financial Times "401 Top Re	. Rankings based on data as of Dec 31, 2015. A tirement Advisers" 2015 Ings based on data as of Dec 31, 2014.
<i>Barron</i> 's "Top 100 Fir <i>Barron</i> 's "Top 100 Financial Advisors" Multi-Year lists	Barron's "Top 100 Financial Advisors" list. Opinions are Barron's who evaluated advisors with a minimum of seven years financial services experience and employed at their current firm for at least one year. Other quantitative and qualitative measures include assets under management, client satisfaction/retention, regulatory records, internal company documents and community involvement of advisor-provided data. Rankings do not reflect any one client's experience, future performance or outcome, endorse any advisor. Compensation was not received from anyone in exchange for rankings for the study. Barron's is a trademark of Dow Jones & Company, All rights reserved.
Barron's "Top 100 Financial Advisors" 2024 list	2024 Barron's "Top 100 Financial Advisors" list. Opinions are Barron's who evaluated advisors with a minimum of seven years financial services experience and employed at their current firm for at least one year. Other quantitative and qualitative measures include assets under management, client satisfaction/retention, regulatory records, internal company documents and community involvement of advisor-provided data. Rankings do not reflect any one client's experience, future performance or outcome, endorse any advisor. Compensation was not received from anyone in exchange for rankings for the study. Barron's is a trademark of Dow Jones & Company, All rights reserved.
Barron's "Top 100 Financial Advisors" 2023 list Barron's "Top 100 Financial Advisors" 2022 list	2023 Barron's "Top 100 Financial Advisors" list. Opinions are Barron's who evaluated advisors with a minimum of seven years financial services experience and employed at their current firm for at least one year. Other quantitative and qualitative measures include assets under management, client satisfaction/retention, regulatory records, internal company documents and community involvement of advisor-provided data. Rankings do not reflect any one client's experience, future performance or outcome, endorse any advisor. Compensation was not received from anyone in exchange for rankings for the study. <i>Barron's</i> is a trademark of Dow Jones & Company, All rights reserved.
Financial Advisors" 2022 list Barron's "Top 100 Financial Advisors" 2021 list	services experience and employed at their current firm for at least one year. Other quantitative and qualitative measures include assets under management, client satisfaction/retention, regulatory records, internal company documents and community involvement of advisor-provided data. Rankings do not reflect any one client's experience, future performance or outcome, endorse any advisor. Compensation was not received from anyone in exchange for rankings for the study. <i>Barron</i> 's is a trademark of Dow Jones & Company, All rights reserved. 2021 Barron's "Top 100 Financial Advisors" list. Opinions are <i>Barron</i> 's who evaluated advisors with a minimum of seven years financial services experience and employed at their current firm for at least one year. Other quantitative and qualitative measures include assets under management, client satisfaction/retention, regulatory records, internal company documents and community involvement of
Barron's "Top 100 Financial Advisors" 2020 list	advisor-provided data. Rankings do not reflect any one client's experience, future performance or outcome, endorse any advisor. Compensation was not received from anyone in exchange for rankings for the study. <i>Barron's</i> is a trademark of Dow Jones & Company, All rights reserved. 2020 Barron's "Top 100 Financial Advisors" list. Opinions are <i>Barron's</i> who evaluated advisors with a minimum of seven years financial services experience and employed at their current firm for at least one year. Other quantitative and qualitative measures include assets under management, client satisfaction/retention, regulatory records, internal company documents and community involvement of advisor-provided data. Rankings do not reflect any one client's experience, future performance or outcome, endorse any advisor.
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Barron's "Top 100 Financial Advisors" 2018 list	2018 Barron's "Top 100 Financial Advisors" list. Opinions are Barron's who evaluated advisors with a minimum of seven years financial services experience and employed at their current firm for at least one year. Other quantitative and qualitative measures include assets under management, client satisfaction/retention, regulatory records, internal company documents and community involvement of advisor-provided data. Rankings do not reflect any one client's experience, future performance or outcome, endorse any advisor. Compensation was not received from anyone in exchange for rankings for the study. <i>Barron's</i> is a trademark of Dow Jones & Company, All rights reserved.
Barron's "Top 100 Financial Advisors" 2017 list	2017 Barron's "Top 100 Financial Advisors" list. Opinions are Barron's who evaluated advisors with a minimum of seven years financial services experience and employed at their current firm for at least one year. Other quantitative and qualitative measures include assets under management, client satisfaction/retention, regulatory records, internal company documents and community involvement of advisor-provided data. Rankings do not reflect any one client's experience, future performance or outcome, endorse any advisor. Compensation was not received from anyone in exchange for rankings for the study. Barron's is a trademark of Dow Jones & Company, All rights reserved.
Barron's "Top 100 Financial Advisors" 2016 list	2016 Barron's "Top 100 Financial Advisors" list. Opinions are Barron's who evaluated advisors with a minimum of seven years financial services experience and employed at their current firm for at least one year. Other quantitative and qualitative measures include assets under management, client satisfaction/retention, regulatory records, internal company documents and community involvement of advisor-provided data. Rankings do not reflect any one client's experience, future performance or outcome, endorse any advisor. Compensation was not received from anyone in exchange for rankings for the study. Barron's is a trademark of Dow Jones & Company, All rights reserved.
Barron's "Top 100 Financial Advisors" 2015 list	2015 Barron's "Top 100 Financial Advisors" list. Opinions are Barron's who evaluated advisors with a minimum of seven years financial services experience and employed at their current firm for at least one year. Other quantitative and qualitative measures include assets under management, client satisfaction/retention, regulatory records, internal company documents and community involvement of advisor-provided data. Rankings do not reflect any one client's experience, future performance or outcome, endorse any advisor. Compensation was not received from anyone in exchange for rankings for the study. Barron's is a trademark of Dow Jones & Company, All rights reserved.
Barron's "Top 100 Financial Advisors" 2014 list Barron's "Top 100 Financial Advisors" 2013 list	2014 Barron's "Top 100 Financial Advisors" list. Opinions are Barron's who evaluated advisors with a minimum of seven years financial services experience and employed at their current firm for at least one year. Other quantitative and qualitative measures include assets under management, client satisfaction/retention, regulatory records, internal company documents and community involvement of advisor-provided data. Rankings do not reflect any one client's experience, future performance or outcome, endorse any advisor. Compensation was not received from anyone in exchange for rankings for the study. Barron's is a trademark of Dow Jones & Company, All rights reserved. 2013 Barron's "Top 100 Financial Advisors" list. Opinions are Barron's who evaluated advisors with a minimum of seven years financial services experience and employed at their current firm for at least one year. Other quantitative and qualitative measures include assets
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Barron's "Top 1,200 Financial Advisors" 2018 list	2018 Barron's "Top 1,200 Financial Advisors" list. Opinions are Barron's who evaluated advisors with a minimum of seven years financia services experience and employed at their current firm for at least one year. Ranking spots determined by each state's population and wealth. Other quantitative and qualitative measures include assets under management, revenues generated for the firm, quality of practice, regulatory records, internal company documents and 100-plus points of advisor-provided data. Rankings do not reflect any on client's experience, endorse any advisor and do not guarantee future investment success. Compensation was not received from anyone for the study. <i>Barron's</i> is a trademark of Dow Jones & Company, Inc. All rights reserved.
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