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Forbes

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Investing involves risk including possible loss of principal.

Source: *Barron's* "Top 1,200 Financial Advisors" list. Advisors considered for the "Top 1,200 Financial Advisors" ranking have a minimum of seven years financial services experience and have been employed at their current firm for at least one year. Quantitative and qualitative measures used to determine the advisor rankings include: 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.

Source: The *Forbes* ranking of "America's Top 250 Wealth Advisors", developed by SHOOK Research, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors with a minimum of seven years of experience and weighing factors like revenue trends, assets under management, compliance records, industry experience and best practices, learned through telephone and in-person interviews. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Neither *Forbes* or SHOOK receive a fee in exchange for rankings. The ranking or ratings shown here may not be representative of all client experiences because they reflect an average or sampling of the client experiences. These rankings or ratings are not indicative of any future performance or investment outcome.

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