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Rankings

Barron’s – Top 1,200 Financial Advisors

Source: Barron’s magazine, March 13, 2020, Top 1,200 Financial Advisors list. Advisors considered for the “America’s Top 1,200 Financial Advisors: State-by-State” ranking have a minimum of seven years financial services experience and have been employed at their current firm for at least one year. Quantitative and qualitative measures 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 or ratings shown here may not be representative of all client experiences because they reflect an average or sampling of client experiences. These rankings or ratings are not indicative of any future performance or investment outcome. For more information, visit www.barrons.com.

Forbes – Best-in-State Wealth Advisors (2021, 2024)

Sources: Forbes magazine, February 11, 2021, and April 3, 2024, Best-in-State Wealth Advisors list. Advisors considered for the “Best-in-State” ranking are selected by SHOOK Research, based on an algorithm of qualitative and quantitative criteria, including in-person interviews, industry experience, compliance records, revenue produced, and assets under management. SHOOK does not receive compensation in exchange for its Top Advisor placements or rankings, which are determined independently. Participation in this directory is limited to ranked advisors; once placed on a ranking, advisors may choose to pay fees to Forbes and SHOOK for premium listing features as indicated by highlighted names. Investors must carefully choose the right advisor for their own situation and perform their own due diligence. SHOOK’s research and rankings provide opinions intended to help investors choose the right financial advisor and are not indicative of future performance or representative of any one client’s experience. Past performance is not an indication of future results. For more information, visit www.shookresearch.com. SHOOK is a registered trademark of SHOOK Research, LLC.

Barron’s – Top 100 Independent Financial Advisors (2023)

Source: Barron’s magazine, September 18, 2023. Advisors considered for the “Top 100 Independent Financial Advisors” list 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. 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. They 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 www.barrons.com.

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