Award Disclosures

*The ranking of *Forbes*' Top Wealth Advisors[1] (Top Women Advisors) is based on an algorithm of qualitative and quantitative criteria, including a minimum of seven years of experience, a minimum of $1 million in production, and the weighing of factors including revenue trends, AUM, compliance records, industry experience, and best practices (gathered through telephone and in-person due-diligence interviews). Shook Research also employs an opinion-based weighting system that prioritizes its preferred "best practices," which include business models, activities, processes, and structure. Overall 9,654 v 1,000 (10.3%) were recognized. For the full methodology[2] that *Forbes* developed in partnership with SHOOK Research, please visit here. This recognition and the due-diligence process conducted are not indicative of the advisor's future performance. Your experience may vary. As your specific needs and circumstances may vary, you are encouraged to conduct your own due diligence. [2] Portfolio performance is not a criterion due to varying client objectives and lack of audited data. SHOOK does not receive a fee in exchange for rankings.

**The 2019 ranking of the Forbes' Best-in-State Wealth Advisors list was developed by SHOOK Research and is based on in-person and telephone due-diligence meetings to evaluate each advisor qualitatively and on 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). Overall, 30,000 advisors were considered, and 3,500 (11.6 percent of candidates) were recognized. The full methodology that Forbes developed in partnership with SHOOK Research is available here. This is not indicative of the adviser's future performance and your experience may vary. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Shook does not receive a fee in exchange for rankings.

***The 2020 RBJ Financial Leaders award is given to local financial professionals based on their professional accomplishments and community involvement. Overall, 8 Wealth Advisors were considered and 3 were awarded (37.5%). This recognition is not indicative of the Wealth Advisor's performance and may not be representative of any one client's experience.

****InvestmentNews Best Practices recognition is awarded to advisory firms that ranked in the top quartile of total firms that responded to the 2019 Compensation and Staffing study and its 2019 profitability study. The award took into account the firm's growth, profitability and revenue per professional and/or staff member. 557 firms were considered and 17 were awarded (3%). This award is not indicative of the Advisor's future performance and may not be representative of any one client's experience.