

**Forbes 2020 Top Women Wealth Advisors-**Forbes rankings, developed by SHOOK Research™, are the only advisor rankings with a focus on quality, including interviewing advisors by telephone and in-person. Unlike other advisor rankings, SHOOK is not a “robo-ranker”. Numbers such as production and assets don’t tell the whole story, especially when much of the data is self-reported. SHOOK Research™ creates rankings of role models-advisors that are leading the way in offering best practices and providing a high-quality experience for clients. A focus on both qualitative and quantitative factors are imperative. The Forbes ranking of America’s Top Women Wealth advisors, developed by SHOOK Research™, is based on an algorithm of qualitative, such as: telephone and in-person interview, a review of best practices, service and investing models, and compliance records; and quantitative data, like revenue trends, assets under management. All advisors have a minimum seven years’ experience. 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 the rankings.

**Indianapolis Business Journal 2019 Fast 25 Award Team Recognition-** Indianapolis Business Journal compiled its annual list of fastest-growing companies through the following procedures: Submissions were solicited through announcements in IBJ and email solicitations. Companies are ranked based on their revenue growth over a three-year period. Companies were eligible if revenue increased each fiscal year, revenue exceeded \$1 million in fiscal year 2016, the company was an independent, privately held corporation, proprietorship or partnership (not a subsidiary or division) through Dec. 31, 2018, the company was founded before fiscal year Jan. 1, 2016, the company was based in the Indianapolis area (Marion, contiguous and Madison counties). Accuracy of entries were verified by letters from the companies’ outside accountants or through the companies’ submitting their tax returns.

**Forbes 2019 Best-in-State Wealth Advisors-** 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 should not be construed as an endorsement of the advisor.

**Barron’s 2019 Top Women Advisors Summit-** Attendees of Barron’s Conference were comprised of 100 women advisors listed in the nations “Top 100 Women Financial Advisors”, as well as 500 financial advisors designated as the top 1% of their firms.

**Forbes 2019 Top Next Gen Best-in-State –** Advisors were selected for the Best-in-State Next Generation Wealth Advisors list based on insights from SHOOK Research™, which compiles quantitative and qualitative data. Advisors were evaluated using a variety of criteria and must have been born after 1980 to quality of the award. Advisors were required to have a minimum of four years relevant experience and acceptable compliance records. Overall ratings were based on but not limited to: client service models, investing process, business types, revenue produced, and assets under management.

**Forbes 2018 Best-in-State Wealth Advisors-** Source: Forbes “Best-in-State Wealth Advisors” ranking in February 2018 was developed by SHOOK Research and is 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 tolerance 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 of sampling of the client experiences. These rankings or ratings are not indicative of any future performance or investment outcome.

**Barron’s 2018 Top Independent Advisor Summit-** Barron’s ([www.barrons.com](http://www.barrons.com)) is America’s premier financial magazine, renowned for its market-moving stories. Published by Dow Jones & Company since 1921, it reaches an influential audience of senior corporate decision makers, institutional investors, individual investors and financial professionals. With new content available every week in print and every business day online, Barron’s provides readers with a comprehensive review of the market’s recent activity, coupled with in-depth, sophisticated reports on what’s likely to happen in the market in the days and weeks to come. As a result, Barron’s is the financial information source these powerful people rely on for market information, ideas and insights they can use to

increase their professional success and enhance their personal, financial well-being. The "Barron's Top 100 Independent Financial Advisors" is a select group of individuals who are screened on a number of different criteria. Among factors the survey takes into consideration are the overall size and success of practices, the quality of service provided to clients, adherence to high standards of industry regulatory compliance, and leadership in "best practices" of wealth management. Portfolio performance is not a factor. Attendees of the Barron's Conference were comprised of the independent advisors listed in "Top 100 Independent Financial Advisors", (August 22, 2017) as well as financial advisors who were chosen by Barron's or their associated firms.

**Five Star 2018 Wealth Manager Award-** The 2018 award is based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Prior to 2012, the award was based on client satisfaction. Respondents evaluated criteria such as customer service expertise, value for free charge and overall satisfaction. The overall score is based on an average of all respondents and may not be representative of any one client's experience.

**Forbes 2018 Top NextGen Wealth Advisor List-** Advisors were selected for the Top Next Generation Wealth Advisors list based on insights from Shook Research™, which compiles quantitative and qualitative data. Advisors were evaluated using a variety of criteria and must have been born after 1980 to qualify for the award. Advisors were required to have a minimum of four years relevant experience and acceptable compliance records. Overall ratings were based on, but not limited to: client service models, investing process, business types, revenue produced, and assets under management

**Barron's 2018 Top Women Advisors Summit-** Barron's 2018 Top Women Advisors Summit- Attendees of Barron's Conference were comprised of 100 women advisors listed in the nations "Top 100 Women Financial Advisors", as well as 500 financial advisors designated as the top 1% of their firms.

**Forbes 2017 Best-in-State Wealth Advisors List-** The ranking, developed by our partner Shook Research, is based on in-person and telephone due-diligence meetings and a ranking algorithm for advisors who have a minimum of seven years of experience. We consider client retention, industry experience, compliance records and firm nominations as well as quantitative criteria such as assets under management and revenue generated for their firms. For the full list and more, see [www.forbes.com/top-wealth-advisors](http://www.forbes.com/top-wealth-advisors). 1 Advisors are judged on individual contribution, but total team assets are shown; in some cases significant, noncustodied assets are not included because of verification difficulties. 2 Minimum account sizes are general, since they can vary depending on a range of circumstances.

**Barron's 2017 Top Independent Advisor Summit-** Barron's ([www.barrons.com](http://www.barrons.com)) is America's premier financial magazine, renowned for its market-moving stories. Published by Dow Jones & Company since 1921, it reaches an influential audience of senior corporate decision makers, institutional investors, individual investors and financial professionals. With new content available every week in print and every business day online, Barron's provides readers with a comprehensive review of the market's recent activity, coupled with in-depth, sophisticated reports on what's likely to happen in the market in the days and weeks to come. As a result, Barron's is the financial information source these powerful people rely on for market information, ideas and insights they can use to increase their professional success and enhance their personal, financial well-being. The "Barron's Top 100 Independent Financial Advisors" is a select group of individuals who are screened on a number of different criteria. Among factors the survey takes into consideration are the overall size and success of practices, the quality of service provided to clients, adherence to high standards of industry regulatory compliance, and leadership in "best practices" of wealth management. Portfolio performance is not a factor. Attendees of the Barron's Conference were comprised of the independent advisors listed in "Top 100 Independent Financial Advisors", (August 22, 2016) as well as financial advisors who were chosen by Barron's or their associated firms.

**Five Star 2017 Wealth Manager Award-** The 2017 award is based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Prior to 2012, the award was based on client satisfaction. Respondents evaluated criteria such as customer service expertise, value for free charge and overall satisfaction. The overall score is based on an average of all respondents and may not be representative of any one client's experience.

**Forbes 2017 Top Next Generation Wealth Advisor List -** As reported by Financial Planning magazine, June 1996-2017, based on total revenue. Advisors were required to have a minimum of four years relevant experience and acceptable compliance records. Overall ratings were based on, but not limited to: client service models, investing process, business types, revenue produced, and assets under management.

**Barron's 2017 Top Women Advisors Summit-** Attendees of Barron's Conference were comprised of 100 women advisors listed in the nations "Top 100 Women Financial Advisors", as well as 500 financial advisors designated as the top 1% of their firms.

**Barron's 2016 Top Independent Advisors Summit-** Barron's ([www.barrons.com](http://www.barrons.com)) is America's premier financial magazine, renowned for its market-moving stories. Published by Dow Jones & Company since 1921, it reaches an influential audience of senior corporate decision makers, institutional investors, individual investors and financial professionals. With new content available every week in print and every business day online, Barron's provides readers with a comprehensive review of the market's recent activity, coupled with in-depth, sophisticated reports on what's likely to happen in the market in the days and weeks to come. As a result, Barron's is the financial information source these powerful people rely on for market information, ideas and insights they can use to increase their professional success and enhance their personal, financial well-being. The "Barron's Top 100 Independent Financial Advisors" is a select group of individuals who are screened on a number of different criteria. Among factors the survey takes into consideration are the overall size and success of practices, the quality of service provided to clients, adherence to high standards of industry regulatory compliance, and leadership in "best practices" of wealth management. Portfolio performance is not a factor. Attendees of the Barron's Conference were comprised of the independent advisors listed in "Top 100 Independent Financial Advisors", (August 24, 2015) as well as financial advisors who were chosen by Barron's or their associated firms.

**Five Star 2016 Wealth Manager Award-** The 2016 award is based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Prior to 2012, the award was based on client satisfaction. Respondents evaluated criteria such as customer service expertise, value for free charge and overall satisfaction. The overall score is based on an average of all respondents and may not be representative of any one client's experience.

**Barron's 2016 Top Women Advisors Summit-** Attendees of Barron's Conference were comprised of 100 women advisors listed in the nations "Top 100 Women Financial Advisors", as well as 500 financial advisors designated as the top 1% of their firms.

**2015 Barron's Top Independent Advisors Summit -** Barron's ([www.barrons.com](http://www.barrons.com)) is America's premier financial magazine, renowned for its market-moving stories. Published by Dow Jones & Company since 1921, it reaches an influential audience of senior corporate decision makers, institutional investors, individual investors, and financial professionals. With new content available every week in print and every business day online, Barron's provides readers with a comprehensive review of the market's recent activity, coupled with in-depth, sophisticated reports on what's likely to happen in the market in the days and weeks to come. As a result, Barron's is the financial information source these powerful people rely on for market information, ideas, and insights they can use to increase their professional success and enhance their personal, financial well-being. The "Barron's Top 100 Independent Financial Advisors" is a select group of individuals who are screened on a number of different criteria. Among factors the survey takes into consideration are the overall size and success of practices, the quality of service provided to clients, adherence to high standards of industry regulatory compliance, and leadership in "best practices" of wealth management. Portfolio performance is not a factor. Attendees of the Barron's Conference were comprised of the independent advisors listed in "Top 100 Independent Financial Advisors", (August 23, 2014) as well as financial advisors who were chosen by Barron's or their associated firms.

**Five Star 2015 Wealth Manager Award-** The 2017 award is based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Prior to 2012, the award was based on client satisfaction. Respondents evaluated criteria such as customer service expertise, value for free charge and overall satisfaction. The overall score is based on an average of all respondents and may not be representative of any one client's experience.

**Barron's 2015 Top Women Advisors Summit-** Attendees of Barron's Conference were comprised of 100 women advisors listed in the nations "Top 100 Women Financial Advisors", as well as 500 financial advisors designated as the top 1% of their firms.

**Barron's 2014 Top Women Advisors Summit -** Attendees of Barron's Conference were comprised of 100 women advisors listed in the nations "Top 100 Women Financial Advisors", as well as 500 financial advisors designated as the top 1% of their firms.

**Five Star 2014 Wealth Manager Award-** The 2014 award is based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Prior to 2012, the award was based on client satisfaction. Respondents evaluated criteria such as customer

service expertise, value for free charge and overall satisfaction. The overall score is based on an average of all respondents and may not be representative of any one client's experience.

**Barron's 2013 Top Women Advisors Summit** - Attendees of Barron's Conference were comprised of 100 women advisors listed in the nations "Top 100 Women Financial Advisors", as well as 500 financial advisors designated as the top 1% of their firms.

**Five Star 2013 Wealth Manager Award-** The 2013 award is based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Prior to 2012, the award was based on client satisfaction. Respondents evaluated criteria such as customer service expertise, value for free charge and overall satisfaction. The overall score is based on an average of all respondents and may not be representative of any one client's experience.

**Five Star 2012 Wealth Manager Award-** The 2012 award is based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Prior to 2012, the award was based on client satisfaction. Respondents evaluated criteria such as customer service expertise, value for free charge and overall satisfaction. The overall score is based on an average of all respondents and may not be representative of any one client's experience.

**Five Star 2011 Wealth Manager Award** – The 2012 award is based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Prior to 2012, the award was based on client satisfaction. Respondents evaluated criteria such as customer service expertise, value for free charge and overall satisfaction. The overall score is based on an average of all respondents and may not be representative of any one client's experience.