

KUDOS!

Our team has once again earned distinction as one of the 2024 Forbes Best-in-State Wealth Management Teams, securing an impressive #5 ranking among countless other teams.

Our journey of innovation and growth has led to numerous prestigious Forbes awards, a testament to our unwavering commitment to excellence. These accolades, while humbling, underscore the impact of our team's dedication to pushing boundaries and consistently delivering value to our clients. We are grateful for the recognition and view these awards not as a final destination, but as milestones in an ongoing pursuit of innovation.

As we proudly display our Forbes honors, we remain focused on continuous improvement. We specialize our approach to multi-generational family planning and stay true to our mission of providing unparalleled solutions with humility and gratitude for the trust our clients place in us.



CLARITY. CONFIDENCE. STRUCTURE.



SHOOK* RESEARCH

and RECOGNIZED BY FORBES MAGAZINE



as one of the Best-in-State Wealth Advisors*: **Tony Parr**, Partner, in 2020, 2021, 2022 and 2023;



Brian McKnight, Partner, in 2021, 2022, and 2023,



and Top Next-Gen Wealth Advisor Best-in-State*: **John Rudi**, Partner, in 2022 and 2023.

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*The Forbes Best-In-State Wealth Management Teams, Best-In-State Wealth Advisors, and Top Next-Gen Wealth Advisor Best-In-State rating algorithms are based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC, which does not receive compensation from the advisors or their firms in exchange for placement on a rating. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria. Fee paid for use of logo.

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