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AdvisorHub's Advisors to Watch are selected from a pool of nominations based on survey data from 20 firms as well as from individual RIAs using data representing the 12-month period ending December 31 of the year prior to publication. Firms were asked to nominate their top 1% based on growth, quality of service, and character, resulting in 587 nominees. Qualified advisors met the following minimum requirements: seven years of experience, an acceptable regulatory/compliance record, and employment with current firm dating back to at least January 1, 2020, that is in good standing. The ranking methodology is based on three basic categories: quality of practice (including assets under management, number of client households, number of financial advisors (if a team), total team size, and production), year-over-year growth (including assets under management, number of client households, and team size), and professionalism and character (years of experience, professional designations, compliance record, participation on charity boards, and diverse team makeup). Quality of practice and year-over-year growth account for up to 85% of the total score. Investment performance is not a criterion. *AdvisorHub* does not receive compensation from the advisors or their firms in exchange for placement on the list. The ranking may not be representative of any one client's experience and is not indicative of the financial advisor's future performance. Advisors nominated for the Advisors to Watch ranking may be placed on one of several related lists, including 50 Advisors to Watch (Over \$1 Billion in Assets), 50 Advisors to Watch (Under \$1 Billion in Assets), 25 Women Advisors to Watch, 25 Next Gen Advisors to Watch, and Fastest Growing Advisors to Watch.

Year	Date	Nominations
2022	September 19, 2022	587

Barron's Top 1,200 Advisors are identified by *Barron's* magazine, using data provided by a pool of nominated advisors representing the 12-month period ending September 30 of the year prior to publication. Factors included in the rankings: assets under management, revenue produced for the firm, regulatory record, quality of practice, and philanthropic work. Investment performance is not a criterion. The rating may not be representative of any one client's experience and is not indicative of the financial advisor's future performance. Neither the broker-dealer nor its financial advisors pay a fee to *Barron's* in exchange for the rating. *Barron's* is a registered trademark of Dow Jones & Company, L.P. All rights reserved.

Year	Date	Nominations
2019	March 8, 2019	4,000
2020	March 13, 2020	4,000
2021	March 12, 2021	4,000
2022	March 11, 2022	6,000
2023	March 10, 2023	6,000

Forbes' America's Top Wealth Advisors rankings are based on the opinions of SHOOK Research, LLC and are selected from a pool of nominations using data representing the 12-month period ending March 31 of the year of publication. Advisors are judged on individual contribution, but total team assets are shown, which can include one or more additional advisors. Qualifying advisors met the following basic requirements: a minimum of seven years as an advisor, a minimum of one year at their current firm, recommended and nominated by their firm, completion of an online survey, over 50% of their revenue/production must be with individuals, and an acceptable compliance record. The ranking algorithm is based on qualitative measures derived from telephone and in-person interviews and surveys; service models, investing process, client retention, experience levels, review of compliance records, firm nominations, etc.; and quantitative criteria, such as assets under management and revenue generated for their firms. Investment performance is not a criterion. Neither SHOOK Research nor *Forbes* receives compensation from the advisors or their firms in exchange for placement on a ranking. The ranking may not be representative of any one client's experience and is not indicative of the financial advisor's future performance. *Forbes* is a registered trademark of Forbes, Inc. All rights reserved.

Year	Date	Nominations
2016	August 3, 2016	13,174
2017	October 24, 2017	19,872
2018	September 12, 2018	25,732
2019	September 10, 2019	30,691
2020	August 25, 2020	32,325
2021	August 24, 2021	33,567
2022	August 24, 2022	36,110

Forbes' America's Top Women Wealth Advisors rankings are based on the opinions of SHOOK Research, LLC and are selected from a pool of nominations using data representing the 12-month period ending September 30 of the year prior to publication. Advisors are judged on individual contribution, but total team assets are shown, which can include one or more additional advisors. Qualifying advisors met the following basic requirements: a minimum of seven years as an advisor, a minimum of one year at their current firm, recommended and nominated by their firm, completion of an online survey, over 50% of their revenue/production must be with individuals, and an acceptable compliance record. The ranking algorithm is based on qualitative measures derived from telephone and in-person interviews and surveys; service models, investing process, client retention, experience levels, review of compliance records, firm nominations, etc.; and quantitative criteria, such as assets under management and revenue generated for their firms. Investment performance is not a criterion. Neither SHOOK Research nor *Forbes* receives compensation from the advisors or their firms in exchange for placement on a ranking. The ranking may not be representative of any one client's experience and is not indicative of the financial advisor's future performance. *Forbes* is a registered trademark of Forbes, Inc. All rights reserved.

Year	Date	Nominations
2020	April 21, 2020	32,000
2021	March 18, 2021	32,810
2022	February 4, 2022	34,500
2023	February 2, 2023	38,314

Forbes' America's Top Women Wealth Advisors Best-in-State rankings are based on the opinions of SHOOK Research, LLC and are selected from a pool of nominations using data representing the 12-month period ending September 30 of the year prior to publication. Advisors are judged on individual contribution, but total team assets are shown, which can include one or more additional advisors. Qualifying advisors met the following basic requirements: a minimum of seven years as an advisor, a minimum of one year at their current firm, recommended and nominated by their firm, completion of an online survey, over 50% of their revenue/production must be with individuals, and an acceptable compliance record. The ranking algorithm is based on qualitative measures derived from telephone and in-person interviews and surveys; service models, investing process, client retention, experience levels, review of compliance records, firm nominations, etc.; and quantitative criteria, such as assets under management and revenue generated for their firms. Investment performance is not a criterion. Neither SHOOK Research nor *Forbes* receives compensation from the advisors or their firms in exchange for placement on a ranking. The ranking may not be representative of any one client's experience and is not indicative of the financial advisor's future performance. *Forbes* is a registered trademark of Forbes, Inc. All rights reserved.

Year	Date	Nominations
2022	February 4, 2022	34,500
2023	February 2, 2023	38,314

Forbes' Best-In-State Wealth Advisors rankings are based on the opinions of SHOOK Research, LLC and are selected from a pool of nominations using data representing the 12-month period ending June 30 of the year prior to publication. Advisors are judged on individual contribution, but total team assets are shown, which can include one or more additional advisors. Qualifying advisors met the following basic requirements: a minimum of seven years as an advisor, a minimum of one year at their current firm, recommended and nominated by their firm, completion of an online survey, over 50% of their revenue/production must be with individuals, and an acceptable compliance record. The ranking algorithm is based on qualitative measures derived from telephone and in-person interviews and surveys; service models, investing process, client retention, experience levels, review of compliance records, firm nominations, etc.; and quantitative criteria, such as assets under management and revenue generated for their firms. Investment performance is not a criterion. Neither SHOOK Research nor *Forbes* receives compensation from the advisors or their firms in exchange for placement on a ranking. The ranking may not be representative of any one client's experience and is not indicative of the financial advisor's future performance. *Forbes* is a registered trademark of Forbes, Inc. All rights reserved.

Year	Date	Nominations
2018	February 15, 2018	Over 25,000
2019	February 21, 2019	Over 30,000
2020	January 16, 2020	Over 32,000
2021	February 11, 2021	32,725
2022	April 7, 2022	34,925
2023	April 4, 2023	39,007

Forbes' Best-in-State Wealth Management Teams are based on the opinions of SHOOK Research, LLC and are selected from a pool of nominations using data representing the 12-month period ending March 31 of the year prior to publication. Qualifying teams met the following basic requirements: five or more team members with at least one financial advisor, a minimum of seven years as an advisor for at least one advisor being evaluated, at least two individuals above support level as principals and/or equity holders, fully operational as a team for a minimum of one year, a minimum of one year at their current firm, recommended and nominated by their firm, and an acceptable compliance record for each partner/principal being evaluated. The ranking algorithm is based on qualitative measures derived from telephone, virtual, and in-person interviews and surveys; service models, investing process, team construct, skill sets, revenue trends, assets under management, and compliance records. Investment performance is not a criterion. Neither SHOOK Research nor *Forbes* receives compensation from the advisors or their firms in exchange for placement on a ranking. The ranking may not be representative of any one client's experience and is not indicative of the team's future performance. *Forbes* is a registered trademark of Forbes, Inc. All rights reserved.

Year	Date	Nominations
2022	January 12, 2023	Over 8,000

Forbes' Top Next-Gen Wealth Advisors rankings are based on the opinions of SHOOK Research, LLC and are selected from a pool of nominations using data representing the 12-month period ending March 31 of the year in which each ranking is published. Advisors were rated based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. Those advisors that are considered were under the age of 40 and have a minimum of four years' experience, including at least one year at their current firm. The algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience, and those that encompass the highest standards of best practices. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither SHOOK Research nor *Forbes* receives compensation from the advisors or their firms in exchange for placement on a ranking. The ranking may not be representative of any one client's experience and is not indicative of the financial advisor's future performance. *Forbes* is a registered trademark of Forbes, Inc. All rights reserved.

Year	Date	Nominations
2017	July 25, 2017	19,000
2018	July 25, 2018	23,000
2019	September 3, 2019	29,000
2020	July 22, 2020	32,200
2021	September 21, 2021	34,000
2022	August 3, 2022	35,645

Forbes' Top Next-Gen Wealth Advisors Best-in-State rankings are based on the opinions of SHOOK Research, LLC and are selected from a pool of nominations using data representing the 12-month period ending March 31 of the year in which each ranking is published. Advisors were rated based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. Those advisors that are considered were under the age of 40 and have a minimum of four years' experience, including at least one year at their current firm. The algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience, and those that encompass the highest standards of best practices. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither SHOOK Research nor *Forbes* receives compensation from the advisors or their firms in exchange for placement on a ranking. The ranking may not be representative of any one client's experience and is not indicative of the financial advisor's future performance. *Forbes* is a registered trademark of Forbes, Inc. All rights reserved.

Year	Date	Nominations
2022	August 3, 2022	35,645

Working Mother's Top Wealth Advisor Moms rankings are based on the opinions of SHOOK Research, LLC and are selected from a pool of nominations using data representing the 12-month period ending March 31 of the year of publication. SHOOK Research considered wealth advisors who are mothers with at least one child living at home and under the age of 21. Ranking algorithm is based on qualitative measures derived from telephone and in-person interviews and surveys: service models, investing process, client retention, industry experience, review of compliance records, firm nominations, etc.; and quantitative criteria, such as assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC. Neither SHOOK nor *Working Mother* receives compensation from the advisors or their firms in exchange for placement on a ranking.

Year	Date	Nominations
2020	July 22, 2020	32,200
2021	September 21, 2021	34,000