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The *Forbes* ranking of Best-In-State Wealth Advisors, developed by SHOOK Research, is 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 have a minimum of seven years' experience, and the algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. 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 rankings.

Barron's.com (March 2023) Barron's Top 1,200 Financial Advisors: State-by-State ranking awarded in 2023. This ranking was determined based on an evaluation process conducted by Barron's during the period from Sept 2021 - Sept 2022. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to Barron's to obtain or use the ranking. This ranking 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. Rankings are based on the opinions of Barron's and this ranking may not be representative of any one client's experience. This ranking is not indicative of the Financial Advisor's future performance. Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved.

Also please make sure anywhere that we post it, we state the year the award is for and that we paid no comp to participate. In addition we need to maintain a copy of the questionnaire that was filled on file, the SEC can ask for substantiation of our methodology disclosure.