

“USA TODAY’s *Best Financial Advisory Firms 2024*” was published on April 23, 2024, and is a ranking of registered investment advisory firms prepared by USA Today and Statista, Inc.

The ranking is based on recommendations by financial advisors, clients and industry experts and a firm’s development of Assets Under Management (AUM). Recommendations were collected via an independent survey among over 25,000 individuals, and self-recommendations were prohibited.

AUM development was analyzed both in the short-and long-term using publicly available data from the SEC IAPD regulatory database. Short-term AUM development was calculated over a twelve-month period from January 2023 to January 2024, while long-term development spanned a five-year period from 2019 to 2024. The 500 RIA firms with the highest score were awarded as USA TODAY’s *Best Financial Advisory Firms*. <https://www.usatoday.com/story/money/2024/04/23/financial-advisor-top-firms-ranking/73327679007/>

Organizations do not pay for, or need to apply, to appear on this list. Blue Chip Partners paid a license fee to USA TODAY to publicize the ranking.

For more information on the methodology used visit: <https://www.bluechippartners.com/wp-content/uploads/2024/08/Methodology-USA-TODAY-Best-Financial-Advisory-Firms-2024.pdf>