

USA Today 2025 Award Disclaimer:

USA TODAY's "Best Financial Advisory Firms 2025", published on April 22, 2025, is an annual ranking of registered investment advisory (RIA) firms created by USA Today and Statista, Inc. Blue Chip Partners did not pay any compensation to be considered or included on this list. Blue Chip Partners paid a license fee to USA TODAY to publicize the ranking.

Award Methodology: The USA TODAY / Statista ranking is based on two dimensions: (1) recommendations by clients, industry experts and financial advisors, and (2) the RIA's growth in short-term (Jan. 2024 to Jan. 2025) and long-term (2020 to 2025) Assets under Management (AUM). Recommendations were collected via an independent survey among over 30,000 individuals. Clients, industry experts and financial advisors working for an RIA firm could recommend the RIA firms they find commendable. Self-recommendations were prohibited and were therefore not included in the evaluation, and any events after February 13, 2025, were also not considered in the analysis. The final score was calculated by weighting recommendations at 20% and AUM development at 80%. Within the AUM growth metric, short-term and long-term growth were each weighted 30/70. The 500 RIA firms with the highest score were awarded as USA TODAY's "Best Financial Advisory Firms". The full 2025 ranking, including more information on the methodology used, can be found at the following link: <https://www.usatoday.com/story/money/2025/04/22/top-financial-adviser-firms/78030977007/>

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