

Disclosure Link (2024):

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. 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/2025/02/AD2024-209-Methodology-USA-TODAY-Best-Financial-Advisory-Firms-2024.pdf>

Disclosure Link (2025):

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/2024/04/23/financial-advisor-top-firms-ranking/73327679007/>