

Forbes Top RIA 2025 Disclosure

The Forbes Top RIA Firms 2025 ranking was published October 1, 2025 and covers the year 2025. Blue Chip Partners did not pay a fee to participate in the ranking. The annual Forbes list, developed by SHOOK Research, evaluates RIA firms based on qualitative and quantitative data. The algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices and approach to working with clients. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings. The ranking highlights independent firms that set a high standard for the wealth management profession.

The complete 2025 Forbes | SHOOK Top RIA list can be viewed [here](#).

The methodology used in the 2025 Forbes | SHOOK Top RIA list can be found [here](#).

USA TODAY 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/2025/04/22/top-financial-adviser-firms/78030977007/>