

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 'Best Financial Advisor Firms' Award Disclaimers

USA Today 2026 Award Disclaimer:

USA TODAY's "Best Financial Advisory Firms 2026", published in April 2026, 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. To be eligible, firms must be registered as an investment advisory firm (RIA firm) with the SEC and/or at state level for at least one year, maintain a principal office in the United States, have a clean disciplinary record, provide financial planning or portfolio management services to individuals and/or small businesses, and manage more than \$500,000 in AUM

The ranking is based on recommendations from clients, industry experts, and financial advisors, and on the firm's development in assets under management (AUM).

Link to full USA Today 2026 Rankings & additional information regarding award methodology:

<https://www.usatoday.com/story/money/2026/04/14/top-best-financial-adviser-firms2026/89482619007/>

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 shortterm (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.

Selfrecommendations 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".

Link to full USA Today 2025 Rankings & additional information regarding award methodology:

<https://www.usatoday.com/story/money/2025/04/22/top-financial-adviser-firms/78030977007/>

USA Today 2024 Award Disclaimer:

“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 twelvemonth 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.

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<https://www.usatoday.com/story/money/2024/04/23/financial-advisortop-firms-ranking/73327679007/>