

Forbes

INVESTING

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BEST-IN-STATE WEALTH ADVISORS

Powered by SHOOK Research

RANK	NAME	COMPANY	CITY	STATE	MINIMUM ACCOUNT SIZE FOR NEW BUSINESS	TEAM ASSETS (CUSTODIED)	TYPICAL SIZE OF HOUSEHOLD ACCOUNTS
10	STEPHEN ENGRO	BEACON FINANCIAL GROUP	DALLAS	TEXAS	\$500K	\$820M	\$2M

Methodology

The Forbes ranking of Best-In-State Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of seven years' experience, and the algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Neither Forbes or SHOOK receive a fee in exchange for rankings. For the full list and more, visit: <https://www.forbes.com/best-in-state-wealth-advisors>. Advisors can complete a survey for upcoming rankings at www.SHOOKresearch.com.