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Potomac Wealth Advisors Adds to its Accolades with Latest Industry Recognition

President Mark Avallone, CFP®, CRPS®, is recognized for expertise, results, and continued achievement of its mission to help its clients achieve their financial goals

Rockville, MD, October 17, 2016— Potomac Wealth Advisors, LLC (Potomac Wealth Advisors), a leading Washington, DC area financial services firm, announces today that its President and Founder, Mark Avallone, CFP®, CRPS® has been recognized as a 2016 Five Star Wealth Manager for the Washington, DC area.

The recognition, conducted by Five Star Professional and ***The Washington Post Magazine,*** selected only 356 top local wealth managers from 1,215 submissions this year, and winners will be featured in the October 23, 2016 issue of ***The Washington Post Magazine.*** Applicants were required to satisfy 10 objective evaluation and eligibility criteria to be considered for the recognition, and a key element of the selection decision was each nominee's five-year client retention rate and favorable regulatory and compliant history review to assess each's overall industry standing.

"I am honored to be nominated for this latest recognition by Five Star Professional and ***The Washington Post Magazine***," said Avallone. "Our firm's mission has always been to help our clients manage their financial lives at all phases of their evolution and transition, and it is gratifying when this effort is acknowledged. We look forward to the future as our footprint continues to grow across the region."

Avallone founded Potomac Wealth Advisors in 2004 with the goal of offering holistic, personalized and ethical financial service solutions to assist clients with managing their money across a variety of life events and transitions. To ensure the client's best interest always remains at the forefront of its work and focus, Potomac Wealth Advisors forges a link between financial planning, asset management, tax management and protecting the plan with the right blend of insurance.

For each client, Potomac Wealth Advisors has a financial planning process geared to the creation of Your Deliberate Future Blueprint. In developing Your Blueprint, Potomac Wealth Advisors engages with the client to determine "What is Your Unique Formula?™" This determination is based on answers to six key questions:

- At what age do you want to achieve your version of financial freedom?
- How much annual income will you need to live the life you want?
- How many assets will you need to accumulate in order to generate that level of income?
- How much do you need to save each month to achieve those goals?
- How do you protect your financial plan and your family along the way?
- How can you accomplish this in a tax-sensitive manner?

Additionally, to ensure effective communication and results throughout the entirety of a client relationship, Potomac Wealth Advisors follows a continuum that includes regular conversations about what is important to the client, carefully thought out recommendations, periodic face-to-face meetings and annual reviews to monitor progress towards goals.

Avallone himself has been recognized in the industry on both the local and national levels. He has contributed to the ***The Wall Street Journal*** and other industry publications and is a regular contributor to ***Forbes.*** Avallone is a frequent guest on WTOP where he comments on current market and economic events.

About Potomac Wealth Advisors, LLC

Potomac Wealth Advisors, LLC is Rockville, MD-based independent financial services firm offering financial planning, asset management and risk management services. Potomac Wealth Advisors, LLC develops customized financial solutions for Gen Xers building their careers, Baby Boomers accumulating wealth, and retirees protecting their lifestyles. For more information, contact Potomac Wealth Advisors, LLC at 301-279-2221 or visit www.PotomacWealth.com.

 The Five Star Wealth Manager award, administered by Crescendo Business Services, LLC (dba Five Star Professional), is based on 10 objective criteria. Eligibility criteria – required: 1. Credentialed as a registered investment adviser or a registered investment adviser representative; 2. Active as a credentialed professional in the financial services industry for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by Five Star Professional, the wealth manager has not: A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three customer complaints filed against them [settled or pending] with any regulatory authority or Five Star Professional's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through Five Star Professional's consumer complaint process; feedback may not be representative of any one client's experience; C. Individually contributed to a financial settlement of a customer complaint filed with a regulatory authority; D. Filed for personal bankruptcy; E. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients. Evaluation criteria – considered: 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. Award does not evaluate quality of services provided to clients. Once awarded, wealth managers may purchase additional profile ad space or promotional products. The Five Star award is not indicative of the wealth manager's future performance. Wealth managers may or may not use discretion in their practice and therefore may not manage their client's assets. The inclusion of a wealth manager on the Five Star Wealth Manager list should not be construed as an endorsement of the wealth manager by Five Star Professional or this publication. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by Five Star Professional in the future. For more information on the Five Star award and the research/selection methodology, go to fivestarprofessional.com. 1,215 Maryland wealth managers were considered for the award; 356 or 30% of the award candidates were named 2016 Five Star Wealth Managers.

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