

# 2022 FIVE STAR WEALTH MANAGER



Adam Soloff

Director Financial Planning

Award winner announced in  
*Philadelphia* magazine

**FIVE STAR**  
PROFESSIONAL

**ADAM SOLOFF**

Director Financial Planning

WINNER OF THE 2022  
FIVE STAR WEALTH MANAGER AWARD

Our mission is to help build and help preserve our clients' wealth

## Licenses and Credentials

- CFP® – Certified Financial Planner practitioner designation
- EA – Internal Revenue Service Enrolled Agent
- Licensed in annuity, life, long term care, health, and disability Insurance
- Licensed in business, car, and home Insurance
- Member, Pennypack Environmental Restoration Trust (PERT), Finance Committee
- Author of the book Mindful Finance, 2016.

As the Founder and Managing Member of Soloff Wealth Management, Adam Soloff maintains an intense focus on helping his clients pursue their retirement and investment goals. Over the past 25 years, he has built enduring client relationships based on trust, integrity, and objective financial planning and investment advice.

As winner of the Five Star Wealth Management award for eight consecutive years, Adam understands that his most valuable assets are the relationships he builds with his clients. That's why he personally works with individuals to understand, grow, and preserve their portfolios throughout all stages of life. Offices in Warminster and Huntingdon Valley, PA Adam is a seasoned independent advisor, certified in financial planning and tax preparation. He has shared his extensive industry knowledge and experience by teaching Financial Planning at Pennsylvania State University from 2010-2016. He is a Federally Authorized Tax Practitioner with the IRS, allowing him to provide tax advice and representation.

Adam earned his Bachelor of Science degree from Pennsylvania State University before fulfilling his CERTIFIED FINANCIAL PLANNER™ requirements at the American College of Bryn Mawr. Prior to forming Soloff Wealth Management, Adam co-founded Lighthouse Wealth Management Group in Marlton, New Jersey, a financial advisory practice focused on investment management.

Adam is a Ten-year Five Star Wealth Manager award winner and has been featured in Philadelphia magazine.

Securities and Advisory services offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC

This award was issued on 11/1/2022 by Five Star Professional (FSP) for the time period 2/21/2022 through 8/19/2022. Fee paid for use of marketing materials. Self-completed questionnaire was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria. 3,604 Philadelphia-area wealth managers were considered for the award; 305 (8% of candidates) were named 2022 Five Star Wealth Managers. 2021: 6,123 considered, 459 winners; 2020: 2,218 considered, 231 winners; 2019: 1,885 considered, 224 winners; 2018: 1,498 considered, 228 winners; 2017: 1,349 considered, 349 winners; 2016: 1,337 considered, 349 winners; 2015: 1,639 considered, 350 winners; 2014: 1,838 considered, 368 winners; 2013: 1,675 considered, 417 winners; 2012: 1,014 considered, 284 winners. Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. The award is based on 10 objective criteria. Eligibility criteria – required: 1. Credentialed as a registered investment adviser (RIA) or a registered investment adviser representative; 2. Actively licensed as a RIA or as a principal of a registered investment adviser firm for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by FSP, 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 settled or pending complaints filed against them and/or a total of five settled, pending, dismissed or denied complaints with any regulatory authority or FSP's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through FSP'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; D. Filed for personal bankruptcy within the past 11 years; E. Been terminated from a financial services firm within the past 11 years; F. 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. FSP does not evaluate quality of services provided to clients. The 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 clients' 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 FSP 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 FSP in the future. Visit [www.fivestarprofessional.com](http://www.fivestarprofessional.com).