

PINKERTON RETIREMENT SPECIALISTS, LLC ranked "Top ½ of 1% of Registered Investment Advisory Firms in the Nation." by Forbes Magazine October 10, 2023

Forbes Magazine ranked Pinkerton Retirement Specialists, LLC (PRS) #1 in the Inland Northwest - including Idaho and Eastern Washington. Nationally they are listed in the top 1/2 of 1% of financial advisory firms and are ranked #179 out of 42,600 firms surveyed. Dan Pinkerton, founder of PRS, stated: "I'm grateful for the national recognition that testifies of what a phenomenal team we have—it is my great privilege to work alongside them every day!" He further stated: "Our goal has never been to be the biggest, but to be known as the best, by providing a level of service beyond anything our clients have ever experienced. We also thank our many clients nationwide for this honor."

About the List and Important Disclosures Survey Methodology

The Forbes ranking of America's Top RIA Firms, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone, virtual and in-person due-diligence interviews, 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.

For individuals looking for an independent advisor, SHOOK's focus on quality skews its recommendations towards firms in which they can thoroughly understand how each client is actually treated. In doing so, we measure aspects like processes that are inherent in each client relationship, what is the team's purpose, and what is the underlying culture that is seen throughout all levels of employees.

SHOOK states: "When we meet with these independent firms, we take a close look at leadership and the senior principals since they tend to dictate every client's experience. When we meet with a firm or an advisor for a due

diligence meeting, we are always thinking to ourselves, "Would we recommend this firm (or individual) to a friend or family member?" Quality is always first; if we're going to include a firm (or advisor) on our rankings, we have to make sure everyone is of the highest quality."

Ranking Algorithm - The algorithm is designed to fairly compare the business practices of a large group of firms based on quantitative and qualitative elements. Data are weighted to ensure priorities are given to dynamics such as preferred "best practices," business models, recent business activity, etc. Each variable is graded and represents a certain value for each measured component. These data are fed into an algorithm that measures thousands of firms against each other.

SHOOK Disclosures - SHOOK is completely independent and objective and does not receive compensation from the advisors, firms, the media, or any other source in exchange for placement on a ranking. SHOOK is funded through various sources, such as conferences and research partners. Since every investor has unique needs, investors must carefully choose the right advisor for their own situation and perform their own due diligence. SHOOK's research and rankings provide opinions for how to choose the right financial advisor and are not indicative of future performance or representative of any one client's experience. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Remember, past performance is not an indication of future results.

Pinkerton Retirement Specialists, LLC is a Registered Investment Advisor serving clients nationwide from Coeur d'Alene, Idaho. Rankings were based on voluntary submissions. Advisors did not pay to be part of this ranking, nor is the ranking indicative of an advisor's future performance.

Additional information is available at [pinkertonretirement.com](https://www.pinkertonretirement.com) "In the News" page at <https://www.pinkertonretirement.com/p/pinkerton-retirement-in-the-news>. Pinkerton Retirement Specialists is a Registered Investment Advisor. Past performance is no guarantee of future results.

Sources: 1) <https://www.forbes.com/sites/rjshook/2023/10/10/methodology-americas-top-ria-firms-2023/?sh=413dc8c3e26d>
2) www.forbes.com/lists/top-ria-firms