ATLANTA MAGAZINE

SPECIAL ADVERTISING SECTION

2020 ATLANTA FIVE STAR AWARD WINNERS





A SELECT AWARD

Five Star Professional uses its own proprietary research methodology to name outstanding professionals, then works with publications such as *Atlanta* magazine to spread the word about award winners. Each award candidate undergoes a thorough research process (detailed below) before being considered for the final list of award winners. For more information

on how we name outstanding wealth managers, as well as a complete list of winners and our research methodology, go to www.fivestarprofessional.com.

RESEARCH DISCLOSURES

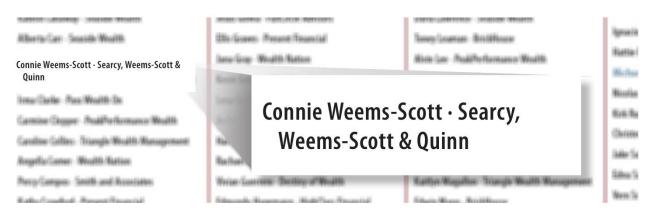
In order to consider a broad population of high-quality wealth managers, award candidates are identified by one of three sources: firm nomination, peer nomination or prequalification based on industry standing. Self-nominations are not accepted. Atlanta award candidates were identified using internal and external research data.

- Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers.
- 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 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 Five Star Professional or Atlanta magazine.
- 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.
- Five Star Professional is not an advisory firm, and the content of this article should not be considered financial advice. For more information on the Five Star award and the research/selection methodology, go to www.fivestarprofessional.com.

2020 Five Star Wealth Manager Criteria:

Eligibility Criteria — Required: 1. Credentialed as an investment advisory representative or a registered investment adviser. 2. Actively employed as a credentialed professional in the financial services industry for a minimum of five years. 3. Favorable regulatory and complaint history review. 4. Fulfilled their firm review based on internal firm 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. 3,314 award candidates in the Atlanta area were considered for the Five Star Wealth Manager award. 268 (approximately 8% of the award candidates) were named 2020 Five Star Wealth Managers.







The Five Start Wealth Manager award, administered by Cescendo Business Services, LIC (dba Five Star Pofessional), is based on 10 objective criteria. Eligibility criteria — required: 1. Credentaled as a registered investment adviser or a a principal of a registered investment adviser firm for a minimum of 5 years). a favorable regulatory and complaint history review (As defined by Five Star Pofessional, the wealth manager has not; A. Been subject to a regulatory cathority or the Star Pofessional's consumer complaint from the subject to a regulatory authority or the Star Pofessional's consumer complaint process. Undownable reducts may have been discovered through a check of complaints registered with a regulatory authority or complaints registered with a regulatory

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