

Awards and recognitions are independently determined and awarded by their respective publications. Reliant Wealth Planning nor its employees pay a fee in return for the award or recognition.

### **Forbes Best In State Top Wealth Advisors – Kentucky**

#### **Forbes Top Women Wealth Advisors**

The *Forbes* ranking, developed by SHOOK Research, is based on an algorithm that weights factors such as revenue trends, assets under management, compliance records and industry experience.

“Forbes” is a registered mark of Forbes LLC. Data for the “Forbes Best-In-State Wealth Advisors” list and “Forbes Top Women Wealth Advisors” is compiled by Forbes’ partners at “SHOOK™ Research, LLC.”. “The Forbes ranking, developed by SHOOK Research, is based on an algorithm of qualitative criteria, gained through telephone, virtual and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of seven years experience, and the algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their 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.”

Additional information about the methodology behind the “2023 Forbes Best-In-State Wealth Advisors” is available at the following link:

<https://www.forbes.com/sites/rjshook/2023/04/04/methodology-americas-top-wealth-advisors-2023/?sh=22d106be4a93>

The rankings list is available at the following link: <https://www.forbes.com/lists/best-in-state-wealth-advisors/?sh=728d8c356ab9>

Additional information about the methodology behind the “2022 Forbes Best-In-State Wealth Advisors” is available at the following link:

<https://www.forbes.com/sites/rjshook/2022/04/07/methodology-forbes-best-in-state-wealth-advisors-2022/?sh=4dfe1f9e7fee>

The rankings list is available at the following link: <https://www.forbes.com/best-in-state-wealth-advisors/#7b7f8f78291d>

Information about the methodology behind the “2023 Forbes Top Women Wealth Advisors” is available at the following link:

<https://www.forbes.com/sites/rjshook/2023/02/02/methodology-americas-top-women-wealth-advisors-2023/?sh=3cf6b75e58ca>

Information about the methodology behind the “2022 Forbes Top Women Wealth Advisors” is available at the following link:

<https://www.forbes.com/sites/rjshook/2022/02/04/methodology-americas-top-women-wealth-advisors-2022/?sh=51cedf001864>

Additional information about the “2021 Forbes Top 250 Wealth Advisors” methodology is available at the following link: <https://www.forbes.com/sites/rjshook/2021/08/24/methodology-americas-top-wealth-advisors-2021/?sh=16d06d9d649c>

SHOOK Disclosure: “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 conferences, publications 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 not indicative of future performance or representative of any one client’s experience. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Remember, past performance is not an indication of future results.”

See the following link for more information: <https://www.shookresearch.com/a-methodology.html>

### ***Business First Largest Financial Advisory Firm***

The *Business First* ranking is based on number of financial advisors at local firms. Local is defined as the Louisville area of Jefferson, Bullitt, Oldham and Shelby counties in Kentucky, and Clark, Floyd and Harrison counties in Indiana.

### ***Business First Corporate Philanthropic Award – Small Company***

The *Business First* award is awarded to Louisville-area businesses for their financial support of charities and worthy causes. The most generous companies in three categories – small, medium and large – are recognized.

### ***Business First 40 Under 40***

The *Business First* award is an annual program honoring regional young leaders. To be awarded this honor, one must be nominated and then complete a questionnaire that asks about career achievements and community accomplishments. Winners are chosen by a group of past 40 Under 40 honorees.