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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.

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

Forbes Best-In-State Top Wealth Advisors

The current 2025 rankings list is available at the following link: <https://www.forbes.com/lists/best-in-state-wealth-advisors/>

Additional information about the methodology behind the “2025 Forbes Best-In-State Wealth Advisors” is available at the following link:

<https://www.forbes.com/sites/rjshook/2025/04/08/methodology-forbes-americas-top-wealth-advisors-2025/>

Additional information about the methodology behind the “2024 Forbes Best-In-State Wealth Advisors” is available at the following link:

<https://www.forbes.com/sites/rjshook/2024/04/03/methodology-best-in-state-wealth-advisors-2024/?sh=64ec1f893fa4>

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>

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>

Additional information about the methodology behind the “2021 Forbes Best-In-State Wealth Advisors” is available at the following link:

<https://www.forbes.com/sites/rjshook/2021/02/11/forbes-best-in-state-wealth-advisors-methodology-2021/>

Additional information about the methodology behind the “2020 Forbes Best-In-State Wealth Advisors” is available at the following link:

<https://www.forbes.com/sites/rjshook/2020/01/16/forbes-best-in-state-wealth-advisors-methodology-2020/>

Additional information about the methodology behind the “2019 Forbes Best-In-State Wealth Advisors” is available at the following link:

<https://www.forbes.com/sites/rjshook/2019/02/20/forbes-best-in-state-wealth-advisors-methodology-2019/>

Forbes Best-In-State Women Wealth Advisors

The current 2025 rankings list is available at the following link: <https://www.forbes.com/lists/best-in-state-women-advisors/>

Information about the methodology behind the “2025 Forbes Best-In-State Women Advisors” is available at the following link:

<https://www.forbes.com/sites/rjshook/2025/02/11/methodology-americas-top-women-wealth-advisors-2025/>

Information about the methodology behind the “2024 Forbes Best-In-State Women Advisors” is available at the following link:

<https://www.forbes.com/sites/rjshook/2024/02/08/methodology-americas-top-women-wealth-advisors-2024/?sh=3009164d4502>

Information about the methodology behind the “2023 Forbes Best-In-State Women 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 Best-In-State Women 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>

Information about the methodology behind the “2021 Forbes Top Women Wealth Advisors” is available at the following link:

<https://www.forbes.com/sites/rjshook/2021/03/24/the-2021-forbes-ranking-of-americas-top-women-wealth-advisors-methodology/>

Information about the methodology behind the “2020 Forbes Best-In-State Women Advisors” is available at the following link:

<https://www.forbes.com/sites/rjshook/2020/04/21/the-2020-forbes-ranking-of-americas-top-women-wealth-advisors-methodology/>