

Forbes: The Forbes ranking of America's Top Wealth Advisors and Best-In-State Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative criteria learned through telephone, virtual and in-person due diligence interviews, and quantitative data such as revenue trends and assets under management. The algorithm additionally weighs factors such as service models, compliance records and industry experience, and focuses on those that encompass best practices in their approach to working with clients. All advisors that are considered have a minimum of seven years' experience. 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. <https://www.forbes.com/lists/best-in-state-wealth-advisors/>

Barron's: "Top 1,200 Financial Advisors," March 2021. Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved. The rankings are based on data provided by over 5,000 individual advisors and their firms and include qualitative and quantitative criteria. Factors included in the rankings: assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work. Investment performance is not an explicit component because not all advisors have audited results and because performance figures often are influenced more by clients' risk tolerance than by an advisor's investment picking abilities. The ranking may not be representative of any one client's experience, is not an endorsement, and is not indicative of advisor's future performance. Neither Stephens Wealth Management Group nor any of its Financial Advisors pay a fee in exchange for this award/rating. Barron's is not affiliated with Stephens Wealth Management Group.

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Forbes: The Forbes ranking of America's Top Women Wealth Advisors rankings, developed by SHOOK Research, are the only advisor rankings with a focus on quality, including interviewing advisors in-person, virtually and by telephone. Unlike other advisor rankings, SHOOK is not a "robo-ranker." Numbers such as production and assets don't tell the whole story, especially when much of the data is self-reported. SHOOK Research creates rankings of role models—advisors that are leading the way in offering best practices and providing a high-quality experience for clients. A focus on both qualitative and quantitative factors is imperative.

How We Rank

The Forbes ranking of America's Top Women Wealth Advisors and Top Women Wealth Advisors Best-In-State, developed by SHOOK Research, is based on an algorithm of qualitative data, learned through surveys and interviews conducted by telephone, in-person and virtually to evaluate best practices, such as service models, investing models and compliance records as well as quantitative data, such as revenue trends and assets under management. All advisors have a minimum of seven years' experience. 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.

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Rankings are based on the opinions of SHOOK Research, LLC and not indicative of future performance or representative of any one client's experience; the firm's research and rankings provide opinions for how to choose the right financial advisor. 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. For more information and complete details on methodology, go to www.shookresearch.com.

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