



304 Family Wealth
RAYMOND JAMES

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FOR IMMEDIATE RELEASE

304 Family Wealth Earns Coveted Spot on Forbes 2025 Best-in-State Wealth Management Teams List

COOKEVILLE – 304 Family Wealth, a trusted financial advisory firm serving the Upper Cumberland, is proud to announce its inclusion in the prestigious Forbes 2025 Best-in-State Wealth Management Teams ranking. This honor recognizes the firm's unwavering commitment to delivering exceptional financial guidance and personalized service to clients.

The Forbes Best-in-State ranking, developed by SHOOK Research, evaluates teams based on a combination of qualitative and quantitative criteria, including client retention, industry experience, compliance records, and assets under management. The recognition underscores 304 Family Wealth's dedication to upholding the highest standards in wealth management.

"Being named to the Forbes Best-in-State list is a testament to our team's dedication to providing outstanding financial advice and fostering lasting relationships with our clients," said Matt Brown, Branch Manager. "We are honored to serve the Upper Cumberland and remain committed to helping our clients achieve their financial goals."

304 Family Wealth is a full-service financial advisory firm with offices in Cookeville, Crossville, and Jamestown, Tennessee. With a focus on personalized financial planning, investment management, and retirement strategies, the firm has been dedicated to helping individuals and families achieve financial security and peace of mind.

The 2025 Forbes ranking of America's Best-in-State Wealth Management Teams, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. This ranking is based upon the period from 3/31/2023 to 3/31/2024 and was released on 01/09/2025. Advisor teams that are considered must have one advisor with a minimum of seven years of experience, have been in existence as a team for at least one year, have at least 5 team members, and have been nominated by their firm. The algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Out of approximately 11,674 team nominations, 5,331 advisor teams received the award based on thresholds. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Compensation provided for using the rating. Raymond James is not affiliated with Forbes or Shook Research, LLC. Please see <https://www.forbes.com/lists/wealth-management-teams-best-in-state> for more info.

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