

# Their reputation precedes ours.

Advisors have demonstrated once again that the reason for our success is theirs.

Congratulations to the Raymond James advisors named to our profession's most distinguished lists in 2019.\*

Mark Aho	Benjamin Boynton	Tony D'Andrea	Peter Frisch	Michael Hines	Tandy Lewis	John Moore	Nathan Quello	Peter Silcox	Paul Tully
David Adams	Jarrett Brady	Grant Davis	Jay Gagne	Brett Hixon	Michael Lipkins	Sue Moore-Bommarito	Tyson Ray	Mickey Silverman	W. Charles Tumlin
Neil Adams	Bert Browen	Timothy Davis	Barry Garber	Todd Hoffman	Jeremy Lott	John Morgan	Traci Richmond	Douglas Simon	Bruce Valliant
Bob Alger	Lee Bryan III	Mark Deering	Neil Garrison	Dan Horgan	John Lynch	Chuck Morris	Susanna Robinson	Bob Sircy, Jr.	Robert Vaughn
Jonathan Allen	John Burke	Lisa Detanna	Kyle Gearhart	Bill Hoyt	G. Carl Mahler, Jr.	W. Scott Mowry	Matthew Rogers	Michael Slaggie	Richard Wagener
Tim Andreas	Jose Cabrera	Susan Dick	Gregory Geegan	Brad Hudson	Christopher Mahoney	Clifford Mulder	Daniel Roland	Glen Smith	Doug Wall
Chad Andrews	Randy Carver	Joseph DiVestea	Charles Genois	David Jackson	Malcolm Makin	Kathy Muldoon	David Rosenthal	Mark Smith	William Waters
San Asato	Joshua Cavett	Jeff Dobyns	Betsy Gibson	Steve Johnson	Dave Malleck	Charles Nemes	Timothy Rush	Sam Spanos	Jon Wax
Jerry Ask	Joshua Charles	Allyn Donaubauer	Michael Gold	Sean Kelly	Mark Marotta	Janet Nichols	Todd Sanford	Walter Sparks	Ben Weiner
Sam Aspinwall	Matt Chope	Christopher Doughty	Jason Goldstein	Brock Kidd	Gene Marx	Christopher Norton	Micah Scheinberg	Alan Spilker	Eliot Weissberg
Luke Aull	Charlie Clawson	Kevin Driscoll	Robert Gooch	Todd Kingsley	Ward Mayer	James Norton	Jeremy Schmidt	William Spry, Jr.	Seth Wernick
Scott Barkow	Jason Claycomb	Norman Duhon	Ivan Gordon	Todd Kissel	Mike Mazzei	Sam Oakley	Craig Schoen	Dawn Starks	Tim Werth
Dudley Barnes	Brian Cochran	Preston Elliott	Brad Gravelle	Gerry Klingman	Andy McClaflyn	Alex Opoulos	Colleen Schon	Margaret Starner	Terry Wiles
James Barnette	Kelia Coffey	Fernando Ereneta	Ellis Green	Jeffrey Kowal	Judith McGee	Herb Ormond	Scott Schuster	Bryan Stepanian	Jamie Williams
Peter Belmont	Benjamin Cohen	Brett Everhart	Gary Greene	Robert Krebs, Jr.	Thomas McIntire	Anthony Panuccio	Leanne Scull	Sherri Stephens	Gordon Wollman
Stephen Besse	Darian Cohen	Anthony Fagella	Steven Grill	James Kruzan	Jim McLaughlin	Dan Parker	Amber Seale	Kevin Sullivan	Rob Wood Jr.
Jon Blahnik	Jonathan Cohen	Andrew Farah	Douglas Gross	Matthew Laird	Robert McMeen	Richard Paulson	Thomas Seiler	Garrett Suydam	Steve Wormeli
Kalita Blessing	Michael Cohen	Arty Finkelberg	Bill Grous	Thomas Lee	John McRae	Van Pearcy	E. Geoffrey Sella	Mike Swain	Tim Wyman
Al Boris	Paul Coldagelli	Mindy Fishel	James Hare	Chris Leeper	Adam Meinrod	Billy Peterson	Roger Shawn	Bryan Sweet	Ken Yarbrough
Kimberlee Bouska	Preston Covington	Sean Fitzpatrick	Richard Harris	Nate LeGrand	Garry Michaelis	John Pettey	Evan Shear	Stephen Sykes	Jason Zaks
Lee Bowen	J. Dow Crocker	Andrew Fowler	Jeff Hausinger	Kris Leizman	Josh Miles	Logan Phillips III	Marta Shen	Paul Tedeschi	
Jim Bowman	Kathy Crowley	Michael Frayman	James Hemenway	Kristopher Lemke	Jason Miyashita	Lynn Phillips-Gaines	Todd Sherman	Ken Thompson	
Ilona Box	Don d'Adesky	Timothy Fries	Donald Hershberger	Jeff Leonard	Todd Moll	Michelle Prince	Al Sicking	Mark Thompson	

\*The above advisors were recognized on the 2019 *Barron's* Top 1,200, the *Forbes* Best-In-State Wealth Advisors or the *Financial Times* Top 400 lists.

*Barron's* "Top 1,200 Financial Advisors," 2019. *Barron's* is a registered trademark of Dow Jones & Company, L.P. All rights reserved. The rankings are based on data provided by over 4,000 individual advisors and their firms and include qualitative and quantitative criteria. Data points that relate to quality of practice include professionals with a minimum of 7 years financial services experience, acceptable compliance records (no criminal U4 issues), client retention reports, charitable and philanthropic work, quality of practice, designations held, offering services beyond investments offered including estates and trusts, and more. Financial Advisors are quantitatively rated based on varying types of revenues produced and assets under management by the financial professional, with weightings associated for each. 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 *Forbes* ranking of Best-In-State Wealth Advisors, developed by SHOOK Research is based on an algorithm of qualitative criteria and quantitative data. Those advisors that are considered have a minimum of 7 years of experience, and the algorithm weighs factors like revenue trends, AUM, 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 29,334 advisors nominated by their firms, 3,477 received the award.

The *FT* 400 was developed in collaboration with Ignites Research, a subsidiary of the *FT* that provides specialized content on asset management. To qualify for the list, advisors had to have 10 years of experience and at least \$300 million in assets under management (AUM). The *FT* reaches out to some of the largest brokerages in the U.S. and asks them to provide a list of advisors who meet the minimum criteria outlined above. These advisors are then invited to apply for the ranking. Only

advisors who submit an online application can be considered for the ranking. In 2018, roughly 940 applications were received and 400 were selected to the final list (42.6%). The 400 qualified advisors were then scored on six attributes: AUM, AUM growth rate, compliance record, years of experience, industry certifications, and online accessibility. AUM is the top factor, accounting for an average of 72 percent of the applicant's score. Additionally, to provide a diversity of advisors, the FT placed a cap on the number of advisors from any one state that's roughly correlated to the distribution of millionaires across the U.S.

The rankings may not be representative of any one client's experience, are not an endorsement, and are not indicative of advisor's future performance. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for these awards/ratings. Raymond James is not affiliated with *Forbes*, Shook Research, LLC, *Barron's*, *Financial Times* or Ignites Research.

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