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FOR IMMEDIATE RELEASE

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DAVID KELLY NAMED TO FORBES LIST OF BEST-IN-STATE NEXT-GENERATION ADVISORS

Grand Blanc, MI – David Kelly, First Vice President, Investments, Managing Director, Branch Manager with Raymond James & Associates, member New York Stock Exchange/SIPC, was recently named to the Forbes list of Best-In-State Next-Generation Advisors, which recognizes advisors from national, regional and independent firms.

“I consider it an honor to be ranked among our country’s top next-generation wealth advisors,” Kelly said. “To be included among such an elite group is humbling.”

The Forbes ranking of “Best-In-State Next-Generation Advisors,” developed by Shook Research, is based on an algorithm of qualitative and quantitative data, rating thousands of advisors with a minimum of four years of experience and weighing factors like telephone and in-person interviews, client retention, industry experience, credentials, review of compliance records, and firm nominations. It also weighs quantitative criteria, such as assets under management and revenue generated for their firms. Investment performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor Shook receives a fee in exchange for rankings.

Kelly, who manages more than \$306 million in client assets, offers his clients Financial Planning, Portfolio Management, Multigenerational Planning, Education Planning, and Risk Management.
Data provided by [SHOOK™ Research, LLC](#) as of 3/31/2019.

SHOOK Research considered advisors born in 1980 or later with a minimum 4 years relevant experience. Advisors have built their own practices and lead their teams; joined teams and are viewed as future leadership; or a combination of both. Ranking algorithm is based on qualitative measures derived from telephone and in-person interviews and surveys: service models, investing process, client retention, industry experience, review of compliance records, firm nominations, etc.; and quantitative criteria, such as assets under management and revenue generated for their firms. Investment performance is not a criteria because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC. Neither SHOOK nor Forbes receives compensation from the advisors or their firms in exchange for placement on a ranking. Raymond James is not affiliated with Forbes or Shook Research, LLC. This ranking is not indicative of advisor’s future performance, is not an endorsement, and may not be representative of individual clients’ experience. Out of 6,389 advisors considered, 1,489 made the final list in 2019. For more information see www.SHOOKresearch.com.

About Raymond James & Associates

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