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## **ARTY FINKELBERG HONORED BY *BARRON'S* FOR EIGHTH CONSECUTIVE YEAR**

RIDGELAND, MS – Arty Finkelberg, CFA, CFP®, Senior Vice President-Investments and Managing Director-Investments of Finkelberg Investments of Raymond James, for the eighth consecutive year has been named to the *Barron's* list of the “Top 1,200 Financial Advisors.”

The 2021 list draws from all 50 states, plus the District of Columbia. Finkelberg was one of just six Mississippi-based advisors to be honored.

*Barron's*, a financial outlet published by Dow Jones & Co., produced the listing of distinguished advisors after weighing criteria such as assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work.\*

“The past year – certainly with the pandemic – was unique and unanticipated, but our team remained true to our investment and retirement strategy,” said Finkelberg. “We always first weigh our clients’ risk tolerance, and then develop a plan based on diversification and expectations that is customized to each client.”



Finkelberg, who manages nearly \$600 million in client assets as of year-end 2020, offers clients wealth management and retirement planning. He has more than 38 years in the financial services industry.

The ranking marks the second time in 2021 that Finkelberg, who heads up the four-member team of Finkelberg Investments of Raymond James, has been honored by a national business publication. *Forbes* selected him among the Best In-State Wealth Advisors, bestowed on him for the fourth year in a row.

To reach Finkelberg or the advisors at Finkelberg Investments, call 601.856.1212. Additional information can be found at [www.finkelberginvestments.com](http://www.finkelberginvestments.com).

**\*Source: 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 4,000 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 Raymond James nor any of its Financial Advisors pay a fee in exchange for this award/rating. Barron's is not affiliated with Raymond James.

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The Forbes ranking of Best-In-State Wealth Advisors, 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. Those advisors that are considered have a minimum of seven years of experience, and the algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices and their approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Out of approximately 32,725 nominations, more than 5,000 advisors received the award. This ranking is not indicative of advisor's future performance, is not an endorsement, and may not be representative of individual client's experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Raymond James is not affiliated with Forbes or Shook Research, LLC. Please visit <https://www.forbes.com/best-in-state-wealth-advisors> for more info.

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