

## **ARTY FINKELBERG NAMED TO *FORBES*' LIST OF BEST-IN-STATE WEALTH ADVISORS**

RIDGELAND, MS – Arty Finkelberg, CFA, CFP®, Senior Vice Presidents-Investments and Managing Director-Investments, of Finkelberg Investments of Raymond James has been selected to the *Forbes* list of [Best-In-State Wealth Advisors](#) for the third consecutive year. The list, which recognizes advisors from national, regional and independent firms, was recently released online.

*Forbes* has honored Finkelberg every year since the original ranking in 2018. The publication listed him as the number two wealth advisor in the state last year.

Finkelberg heads up Finkelberg Investments, a five-member team focused on investment management and retirement planning. According to the publication he oversees approximately \$500 million in assets.

“Finkelberg Investments believes every client’s investment and financial strategy should be based on long-term goals and risk tolerance,” said Finkelberg. “Our investment approach is distinct, and each portfolio is designed to meet client needs and goals.”

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. Advisors that are considered have a minimum of seven years’ experience, and the algorithm weighs 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.

Out of approximately 32,000 nominations, more than 4,000 advisors received the award. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Neither *Forbes* nor SHOOK receives a fee in exchange for rankings. This ranking is not indicative of 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. Raymond James is not affiliated with *Forbes* or Shook Research, LLC.

Finkelberg, who joined Raymond James in 2011, has more than 37 years of experience in the financial services industry.

To reach Finkelberg or the advisors at Finkelberg Investments, more information can be found at [www.raymondjames.com/FinkelbergInvestments](http://www.raymondjames.com/FinkelbergInvestments), or by calling 601-856-1212

**About Forbes ranking of Best-In-State Wealth Advisors**

Source: [SHOOKTM Research, LLC](#). Data as of 6/30/19. [Forbes.com](#) (January, 2020)

**About Raymond James & Associates**

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