

# RAYMOND JAMES®

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FOR IMMEDIATE RELEASE  
Media Contact: Stacy Thompson 321-253-7980  
Website: twmrj.com

## MARK THOMPSON NAMED TO FORBES' LIST OF BEST-IN-STATE WEALTH ADVISORS

Melbourne, FL. – Mark Thompson, CFP®, a financial planner and managing director with Raymond James & Associates, Inc., member New York Stock Exchange/SIPC, was among the Raymond James-affiliated advisors named to the *Forbes* list of [Best-In-State Wealth Advisors](#). The list, which recognizes advisors from national, regional and independent firms, was released online February 20, 2019.

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' experience, and 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. 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.

Thompson, whose office is located at 202 N. Harbor City Blvd., Suite 200 in Melbourne, FL, currently manages more than \$500 million in client assets and specializes in providing comprehensive wealth management services, including estate, retirement, financial and legacy planning. In addition, Mr. Thompson specializes in helping clients prepare their estate for the sale of their business.

*Please include: 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. 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.*

### **About Raymond James & Associates**

Raymond James & Associates, Inc., member New York Stock Exchange/SIPC, which has built a national reputation for more than 50 years as a leader in financial planning for individuals, corporations and municipalities, is a wholly owned subsidiary of Raymond James Financial, Inc. (NYSE-RJF), a leading diversified financial services company with approximately 7,800 financial advisors throughout the United States, Canada and overseas. Total client assets are \$765 billion. Additional information is available at [www.raymondjames.com](http://www.raymondjames.com).

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

Source: Forbes.com (Feb. 2019). Forbes Best-in-State Wealth Advisors ranking was developed by SHOOK Research and is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm

that includes: client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC and not indicative of future performance or representative of any one client's experience. Neither Forbes nor SHOOK Research receives compensation in exchange for placement on the ranking. For more information: [www.SHOOKresearch.com](http://www.SHOOKresearch.com).

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