



AdvisorHub 1,000 Advisors to Watch (RIAs)

AdvisorHub 1,000 Advisors to Watch – 250 RIAs issued by AdvisorHub on Jun. 12, 2025 for the 2024 year was awarded to fee-only individual advisors and teams of advisors. The financial professional applied for the recognition. Criteria used to determine the winner(s): required to have a minimum seven years experience as an advisor, 2 years at current firm, \$150m minimum AUM, and a clean regulatory record (2 or fewer complaints and no significant judgments). Advisors were ranked on the 1) size and makeup of their practice; 2) year-over-year growth; and 3) professionalism. More than 250 people were considered for this honor and 250 were selected. No fee was paid for the nomination, receipt, or promotion of the award. Third-party ratings are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation.

AdvisorHub 1,000 Advisors to Watch (NextGen)

AdvisorHub 1,000 Advisors to Watch – 100 Next Gen issued by AdvisorHub on Jun. 12, 2025 for the 2024 year was awarded to Advisors under the age of 45. The financial professional applied for the recognition. Criteria used to determine the winner(s): required to have a minimum seven years experience, \$150m minimum AUM, and a clean regulatory record. Advisors were ranked on the 1) size and makeup of their practice; 2) year-over-year growth; and 3) professionalism. More than 100 people were considered for this honor and 100 were selected. No fee was paid for the nomination, receipt, or promotion of the award. Third-party ratings are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation.

AdvisorHub 1,000 Advisors to Watch (Solo)

AdvisorHub 1,000 Advisors to Watch – 100 Solo issued by AdvisorHub on Jun. 12, 2025 for the 2024 year was awarded to individuals that are the sole advisor for their clients providing high-quality advice and highly personalized attention with the help of their staff and firm. The financial professional applied for the recognition. Criteria used to determine the winner(s): required to have a minimum seven years experience, \$150m minimum AUM, and a clean regulatory record. Advisors were ranked on the 1) size and makeup of their practice; 2) year-over-year growth; and 3) professionalism. More than 100 people were considered for this honor and 100 were selected. No fee was paid for the nomination, receipt, or promotion of the award. Third-party ratings are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation.

AdvisorHub 1,000 Advisors to Watch (Women)

AdvisorHub 1,000 Advisors to Watch – 100 Women issued by AdvisorHub on Jun. 12, 2025 for the 2024 year was awarded to women advisors. The financial professional applied for the Securities and investment advisory services are offered through the firms: Osaic Wealth, Inc. and Osaic Institutions, Inc., broker-dealers, registered investment advisers, and members of FINRA and SIPC. Securities are offered through Osaic Services, Inc. and Ladenburg Thalmann & Co., broker-dealers and members of FINRA and SIPC. Advisory services are offered through Ladenburg Thalmann Asset Management, Inc., and Osaic Advisory Services, LLC., registered investment advisers. Advisory programs offered by Osaic Wealth, Inc. are sponsored by VISION2020 Wealth Management Corp., an affiliated registered investment adviser.



recognition. Criteria used to determine the winner(s): required to have a minimum seven years experience, 2 years at current firm, \$150m minimum AUM, and a clean regulatory record (2 or fewer complaints and no significant judgments). Advisors were ranked on the 1) size and makeup of their practice; 2) year-over-year growth; and 3) professionalism. More than 100 people were considered for this honor and 100 were selected. No fee was paid for the nomination, receipt, or promotion of the award. Third-party ratings are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation.

AdvisorHub 1,000 Advisors to Watch (Under \$1B)

AdvisorHub 1,000 Advisors to Watch – 250 Under \$1B issued by AdvisorHub on Jun. 12, 2025 for the 2024 year was awarded to advisors who managed less than \$1 billion in assets under management (AUM) and specifically selected for achievements within the \$100 million to \$1 billion AUM range. The financial professional applied for the recognition. Criteria used to determine the winner(s): required to have a minimum seven years experience, 2 years at current firm, \$150m minimum AUM, and a clean regulatory record (2 or fewer complaints and no significant judgments). Advisors were ranked on the 1) size and makeup of their practice; 2) year-over-year growth; and 3) professionalism. More than 250 people were considered for this honor and 250 were selected. No fee was paid for the nomination, receipt, or promotion of the award. Third-party ratings are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation.

AdvisorHub 1,000 Advisors to Watch (Over \$1B)

AdvisorHub 1,000 Advisors to Watch – 200 Over \$1B issued by AdvisorHub on Jun. 12, 2025 for the 2024 year was awarded to advisors who manage over \$1B in assets under management (AUM). The financial professional applied for the recognition. Criteria used to determine the winner(s): required to have a minimum seven years experience, 2 years at current firm, \$150m minimum AUM, and a clean regulatory record (2 or fewer complaints and no significant judgments). Advisors were ranked on the 1) size and makeup of their practice; 2) year-over-year growth; and 3) professionalism. More than 200 people were considered for this honor and 200 were selected. No fee was paid for the nomination, receipt, or promotion of the award. Third-party ratings are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation.

Securities and investment advisory services are offered through the firms: Osaic Wealth, Inc. and Osaic Institutions, Inc., broker-dealers, registered investment advisers, and members of FINRA and SIPC. Securities are offered through Osaic Services, Inc. and Ladenburg Thalmann & Co., broker-dealers and members of FINRA and SIPC. Advisory services are offered through Ladenburg Thalmann Asset Management, Inc., and Osaic Advisory Services, LLC., registered investment advisers. Advisory programs offered by Osaic Wealth, Inc. are sponsored by VISION2020 Wealth Management Corp., an affiliated registered investment adviser.