RANKING CRITERIA

BARRON'S RANKINGS

- 100+ pieces of data gathered from each advisor during the nominations process for each ranking
- Each general category features a significant number of subcalculations
- Financial Advisor rankings are based on three general categories of criteria: assets, revenue, and quality of practice
- Quality of practice component includes an advisor's regulatory/compliance record and philanthropic and charitable activities

FINANCIAL ADVISOR MAGAZINE'S INDEPENDENT RIA RATING

- Ranked by total assets
- Must manage $50 million or more
- Must offer financial planning services predominately to individual clients

WEALTH MANAGER'S TOP WEALTH MANAGER/TOPDOGS

- Average AUM per client
- Six years of ADV-reported assets
- B/Ds or banks ineligible
- Must be registered SEC-registered RIAs

FOUNDATION AND ENDOWMENT NONPROFIT CONSULTANT OF THE YEAR

- Substantial base of nonprofit clients
- Thorough understanding of the industry and their clients' needs
- Open-minded and innovative thought leaders
- Track records of providing astute manager selection advice and helping clients achieve strong returns

REGISTERED REP'S TOP 100 REGISTERED INVESTMENT ADVISORS

- Ranked by assets under management
- Greater than 50% of firm assets must be from the retail marketplace
- Must provide financial planning services, portfolio management for individuals or conduct due diligence on third party advisors
- Must not be doing business as a broker/dealer, bank or insurance company or be a subsidiary of a large financial institution
- RIAs must not invest in proprietary products

WASHINGTONIAN MAGAZINE

- Based on a survey of area financial professionals and research conducted by the magazine