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Third party ratings/rankings included in the Website are Forbes Top Women Wealth Advisors Best-In-State Rankings and Forbes Top Next-Generation Wealth Advisors Best-In-State:

About Forbes Top Women Wealth Advisors Best-In-State Rankings awarded in 2024

Forbes "Top Women Wealth Advisors Best-in-State" list was developed by SHOOK Research. The list was published on February 8, 2024. Rankings were based on data as of September 30, 2023. Opinions provided by SHOOK® Research, LLC and are based on in-person, virtual and telephone due-diligence meetings that measure best practices, client retention, industry experience, credentials, compliance records, firm nominations, assets under management and Firm-generated revenue (investment

performance is not a criterion). SHOOK's rankings are available for client evaluation only, are not indicative of future performance and do not represent any one client's experience and available for investor help in evaluating the right financial advisor and should not be considered an endorsement of the advisor. Compensation was not received from anyone for the study. Past performance does not guarantee future results. Details available at the SHOOK Research website. SHOOK is a registered trademark of SHOOK Research, LLC.

About Forbes Top Next-Generation Wealth Advisors Best-In-State Rankings awarded in 2023

Forbes "Top Next-Generation Wealth Advisors Best-in-State" list was developed by SHOOK Research. The list was published August 8, 2023 with rankings based on data as of March 31, 2023. Opinions provided by SHOOK® Research, LLC considered advisors born in 1984 or later with a minimum 4 years as an advisor. Advisors have built their practices, lead their own teams, joined teams, are considered future leaders, or combinations thereof. Ranking is based on in-person and telephone due-diligence meetings that measure best practices, client retention, industry experience, compliance records, firm nominations, assets under management and Firm-generated revenue (investment performance is not a criterion). Shook's rankings do not reflect all client experiences, endorse any advisor, indicate future performance and are available for client evaluation only. Compensation was not received from anyone for the study. Past performance is no guarantee of future results. Details available at the SHOOK Research website. SHOOK is a registered trademark of SHOOK Research, LLC.

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Severability. If any provision of these Terms & Conditions of Use is deemed invalid or unenforceable, that provision shall be deemed severable and shall not affect the validity, legality or enforceability of the remaining provisions.

Survival. Any section of these Terms & Conditions of Use which by its terms and nature is meant to survive the termination of these Terms & Conditions of Use, shall survive such termination.

Entire Agreement. These Terms & Conditions of Use set forth the entire understanding and agreement between us with respect to the subject matter hereof.