

Gayle B. Canini Award Disclosures:

- Marquis Who's Who publishes biographies of individuals based on phone interviews. Third party biographies 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 or organization nor are they representative of one client's evaluation.
- 2019 Advancing our Profession Award from Ladenburg Institute of Women and Finance. Granted independently based on participation with women in finance. Rankings and recognitions are no guarantee of future investment success and are not representative of all client experiences.
- The "100 Solo Advisors to Watch in 2023" award is given by AdvisorHub and is based solely on an individual advisor's assets under management. There is no fee paid by the advisor to participate, nor are clients consulted. For 2023, 374 advisors were considered. Third-party rankings and recognitions 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.
- The "100 Women to Watch in 2024" award is given by AdvisorHub and is based solely on an individual advisors' assets under management. There is no fee paid by the advisor to participate, nor are clients consulted. For 2024, over 300 firms were considered. Thirty-party rankings and recognitions 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.
- The "100 Women to Watch in 2025" award is given by AdvisorHub and is based solely on an individual advisor's assets under management.
- Ed Slott's Elite IRA Advisor Group is for investment services only. Ed Slott's endorsement does not extend to the financial planning or investment advisory services offered by the representative. Ed Slott's Elite IRA Advisor Group members pay a fee for the educational programs that allow them to be included in Ed Slott's Elite IRA Advisor Group. Membership does not guarantee investment success.
- AdvisorHub 100 Advisors to Watch issued by AdvisorHub in June 2023 for the calendar year June 2023-June 2024 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 100 Women to watch issued by AdvisorHub in June 2024 and June 2025 for the calendar years June 2024-June 2025 and June 2025-June 2026 was awarded to women advisors. The financial professional applied for the recognition. Criteria used to determine the winner(s): required to have a minimum of 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.