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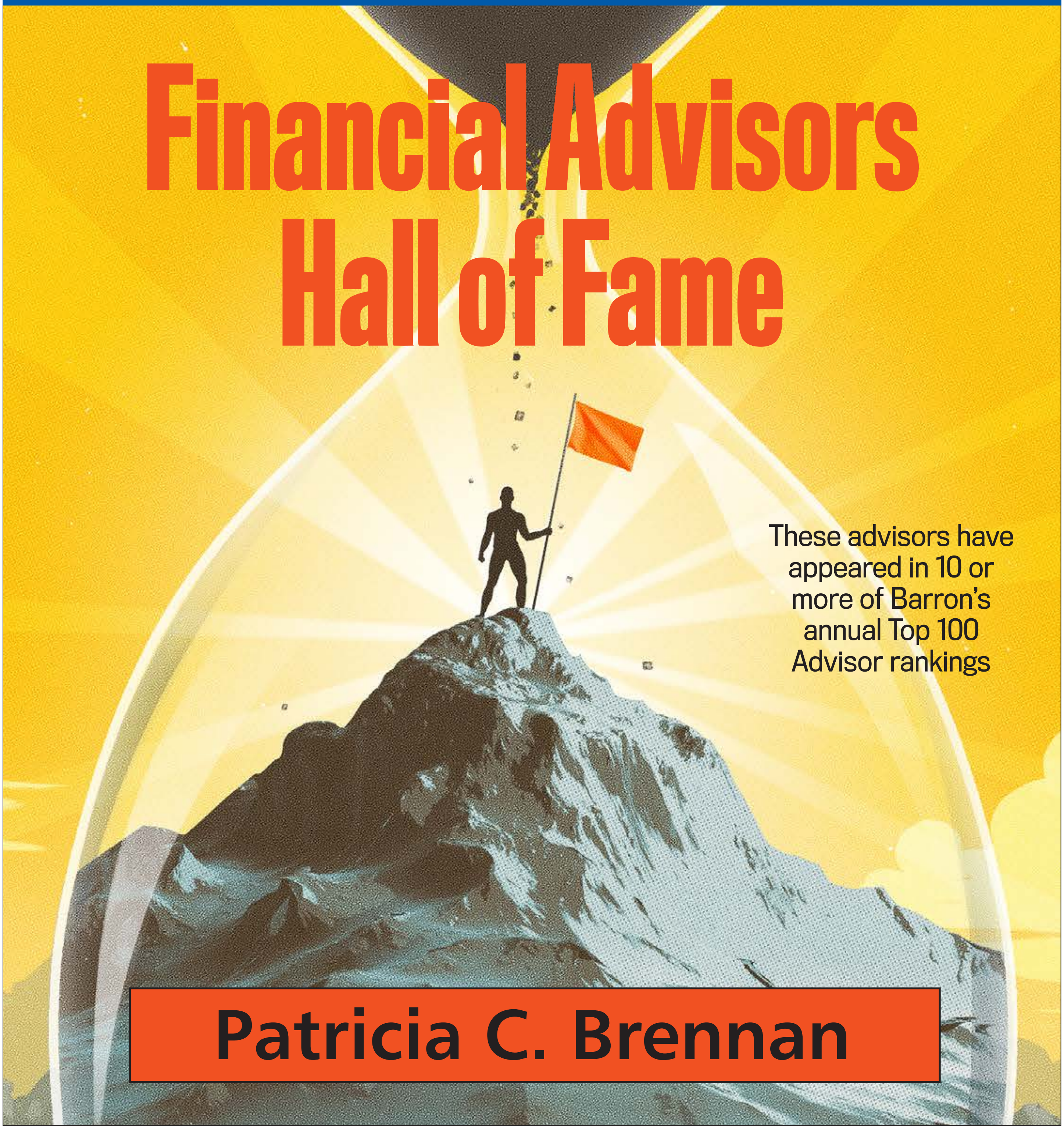

Financial Advisors Hall of Fame

These advisors have appeared in 10 or more of Barron's annual Top 100 Advisor rankings

Patricia C. Brennan

(over please)

ADVISOR RANKING

Barron's Advisor Hall of Fame

Financial advice is a long game. At its core, it's about ensuring clients have enough money to fund their needs, wants and dreams through the end of their lives. The best advisors are those who can demonstrate sustained excellence over a long period and whose practices are set up to serve clients well, even after the advisor has retired or otherwise left the business.

"Barron's Hall of Fame" is an award honoring a group of advisors who exemplify long-term success and commitment to their clients. Each member of the Hall of Fame has appeared in 10 or more of Barron's annual Top 100 Advisor rankings, and their long-looking commitment to excellence is a hopeful example for the industry to follow.

Barron's has been ranking financial advisors since 2004. The rankings started with a general ranking of the nation's Top 100 Advisors. In 2006, we introduced the Top 100 Women Advisors, which highlights the best of a still-underrepresented group of advisors (even today, under 20% of all advisors are women.) The following year, 2007, we launched the Top 100 Independent Advisor rankings, which lists advisors who operate their own practices, as opposed to working within a traditional Wall Street firm. These three rankings are the source of our Hall of Fame list.

To get some perspective on what it means to appear on this list: 600,000 people carry licenses from FINRA, the brokerage industry's regulator. About 300,000 identify specifically as financial advisors, and, of these, Barron's estimates about 120,000 approach financial advice as a full-time vocation. By any measure, then, the 145 Hall of Fame advisors represent a tiny fraction of the best 1% of all advisors in the industry.

So how does Barron's assess excellence in financial advice? What metrics does it use? Advisors appearing in our rankings have answered 100-plus questions about their practices in our annual survey. The questionnaire addresses a wide range of data points, including the assets the advisors oversee, the revenue they collect on those assets, the industry designations they possess, their regulatory records, the length of time they've been in the industry, their charitable and philanthropic work, the investment vehicles they use to allocate assets, the sizes and shapes of their teams, and more.

The rankings specifically do not factor in investment performance, as returns are tied inextricably to the risk tolerances of individual clients; to reward outsize returns would be to encourage advisors to chase them. Instead, we use assets and revenue as our primary quantitative measures, as clients tend to express their satisfaction by voting with their assets and their fees. They also help good advisors grow by referring new clients to them. As Barron's heads into its 17th year of advisor rankings, many of the nation's best advisors are entering the twilight of their careers. The Hall of Fame is part of our effort to honor those who continue to serve clients at the highest level, while also conferring emeritus status on those who are handing off their knowledge and best practices to a new generation of advisors. Please join us in congratulating this esteemed group.

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The "Barron's Hall of Fame" is a select group of individuals who are screened on a number of different criteria. Among factors the survey takes into consideration are the overall size and success of practices, the quality of service provided to clients, adherence to high standards of industry regulatory compliance, and leadership in "best practices" of wealth management. Portfolio performance is not a factor. Please see www.barrons.com for more information.