

Why a derailed \$11 trillion corporate bond market looks ripe for a comeback →



Press Release

Marilyn Suey, Founder of The Diamond Group Wealth Advisors Named 2023 Five Star Wealth Manager

Published: Nov. 2, 2023 at 8:36 a.m. ET

The MarketWatch News Department was not involved in the creation of this content.

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PR Newswire

SAN RAMON, Calif., Nov. 2, 2023

San Francisco/Bay Area-Based Wealth Management Firm

SAN RAMON, Calif., Nov. 2, 2023 /PRNewswire/ -- Five Star Professional and The Diamond Group Wealth Advisors, are pleased to announce that Marilyn Suey, CERTIFIED FINANCIAL PLANNER (TM), has been chosen as a Five Star Wealth Manager for 2023. This is their highest award for Wealth Managers and is based on 10 objective criteria associated with quality services to clients such as credentials, education, regulatory and

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published in the November issue of Diablo Magazine.

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Fiduciary Advisor (R). "It is our purpose and passion to support our clients to design their ideal lifestyles on their journey to reach financial independence. Our clients have come to expect long-term relationships based on excellence in service and the highest levels of trust, as they make informed decisions about their money so that it's working harder for them."

The Five Star Wealth Manager award program is the largest and most widely published award program in the financial services industry. The award is based on a rigorous, multifaceted research methodology, which incorporates input from peers and firm leaders along with client retention rates, industry experience and a thorough regulatory history review.

"We congratulate Marilyn Suey for being named a Five Star Wealth Manager for 2023," said Daxs Stadjuhar, National Managing Director for Mariner Advisor Network. "We look forward to our continued success working together in support of our clients and our growing community."

About the research process:

Now entering its 18th year, Five Star Professional conducts in-depth, market-specific research in more than 45 markets across the United States and Canada to identify premium service professionals.

Wealth manager award candidates are identified through firm nominations, peer nominations and industry qualifications, and then evaluated on 10 objective eligibility and evaluation criteria including client retention rates, client assets administered, firm review and a favorable regulatory and compliant history.

Self-nominations are not accepted, and wealth managers do not pay a fee to be considered or awarded. The award is not indicative of the wealth manager's future investment performance. For detailed information on the Five Star Wealth Manager research methodology visit <http://www.fivestarprofessional.com>.

About The Mariner Advisor Network

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myriads of people and organizations that they have partnered with to provide you with the personalized financial advice that you are seeking. Behind the scenes, your advisor

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they have the support needed to help you plan for your financial future.

One of those key relationships is Mariner Advisor Network. Mariner Advisor Network comprises a highly specialized group of business, investment, operational, and compliance professionals dedicated to serving the needs of an elite community of independent financial advisors. United by a common bond of excellence and the desire to elevate their practices, our Advisors partner with us in the pursuit of growth, efficiency, acquisition strategies and seamless succession plans. The Diamond Group Wealth Advisors has been a partner office of Mariner Advisor Network since 2016.

About The Diamond Group Wealth Advisors

The Diamond Group Wealth Advisors is an independent wealth management firm providing integrated financial planning and investment management services for business owners, healthcare professionals, entrepreneurs, and women in transition. Using our disciplined planning system, Your Prosperity Blueprint Process(TM), we collaborate with you to design your personalized plan to define your path to financial independence. Our goal is to serve and support you so you can take care of your family, your businesses and/or careers, and the causes you care about deeply. Our core values are trust, transparency, commitment, compassion, and collaboration.

For your complimentary Lifestyle Upgrade Assessment, contact Marilyn at 925-219-0080 or email marilyn.suey@diamondgroupwealthadvisors.com.

Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the certification mark CERTIFIED FINANCIAL PLANNERTM and CFP(R) (with plaque design) in the United States, which it authorizes use of individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Marilyn Suey is a Registered Representative with, and Securities and Retirement Plan Consulting Program advisory services offered through LPL Financial, a registered investment advisor, member FINRA/SIPC. Other advisory services offered through Mariner Independent Advisor Network, LLC a Registered Investment Advisor. Mariner Independent Advisor Network, LLC and The Diamond Group Wealth Advisors are separate entities from LPL Financial. CA Insurance License #0E01981

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Marilyn Suey

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925-219-0080

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