

Bloomberg and Five Star Professional Names Marilyn Suey, Founder of The Diamond Group Wealth Advisors, As Five Star Wealth Manager for the San Francisco/East Bay Area-Based Wealth Management Firm

Provided by PR Newswire

Mar 19, 2024 5:52am

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PR Newswire

SAN RAMON, Calif., March 19, 2024

SAN RAMON, Calif., March 19, 2024 /PRNewswire/ -- Financial news giant Bloomberg and Five Star Professional today announced that Marilyn Suey, CERTIFIED FINANCIAL PLANNER™, has been chosen as a Five Star Wealth Manager for 2023 for the San Francisco/East Bay Area.

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, incorporating input from peers and firm leaders, client retention rates, industry experience, and a thorough regulatory history review.

Five Star Professional employed a rigorous research process to identify the Five Star award winners in cities across the United States. Award-winning

professionals were carefully selected among thousands of wealth managers for their knowledge, service, and experience.

Winners represent some of the country's most dedicated wealth managers and investment professionals, each committed to pursuing professional excellence and providing exceptional service to their clients.

Five Star Professional identified award candidates based on industry data and nominations received from industry firms and individuals. Self-nominations are not accepted. 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>.

"I am honored to be named among such a prominent list of well-respected wealth managers," said Marilyn Suey, Accredited Investment Fiduciary[®] and Certified Plan Fiduciary Advisor[®]. "It is our purpose and passion to support our clients to design their ideal lifestyles on their journey to pursue financial independence. Our clients have come to expect long-term relationships based on excellence in service and professionalism, as they make informed decisions about their money in pursuit of their financial freedom."

About Five Star Professional

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.

For detailed information on the Five Star Wealth Manager research methodology, visit <http://www.fivestarprofessional.com>.

About The Diamond Group Wealth Advisors

The Diamond Group is an independent wealth management firm that empowers its clients to design their ideal lifestyle starting today, for tomorrow, and for life.

We believe "Your Wealth Is More than Your Money."

Our approach to building your customized plan honors what matters to you most. Your motivations, aspirations, and the causes you care about deeply.

Our core values are trust, 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® (with plaque design) in the United States, which authorizes the use of individuals who successfully complete the CFP Board's initial and ongoing certification requirements.

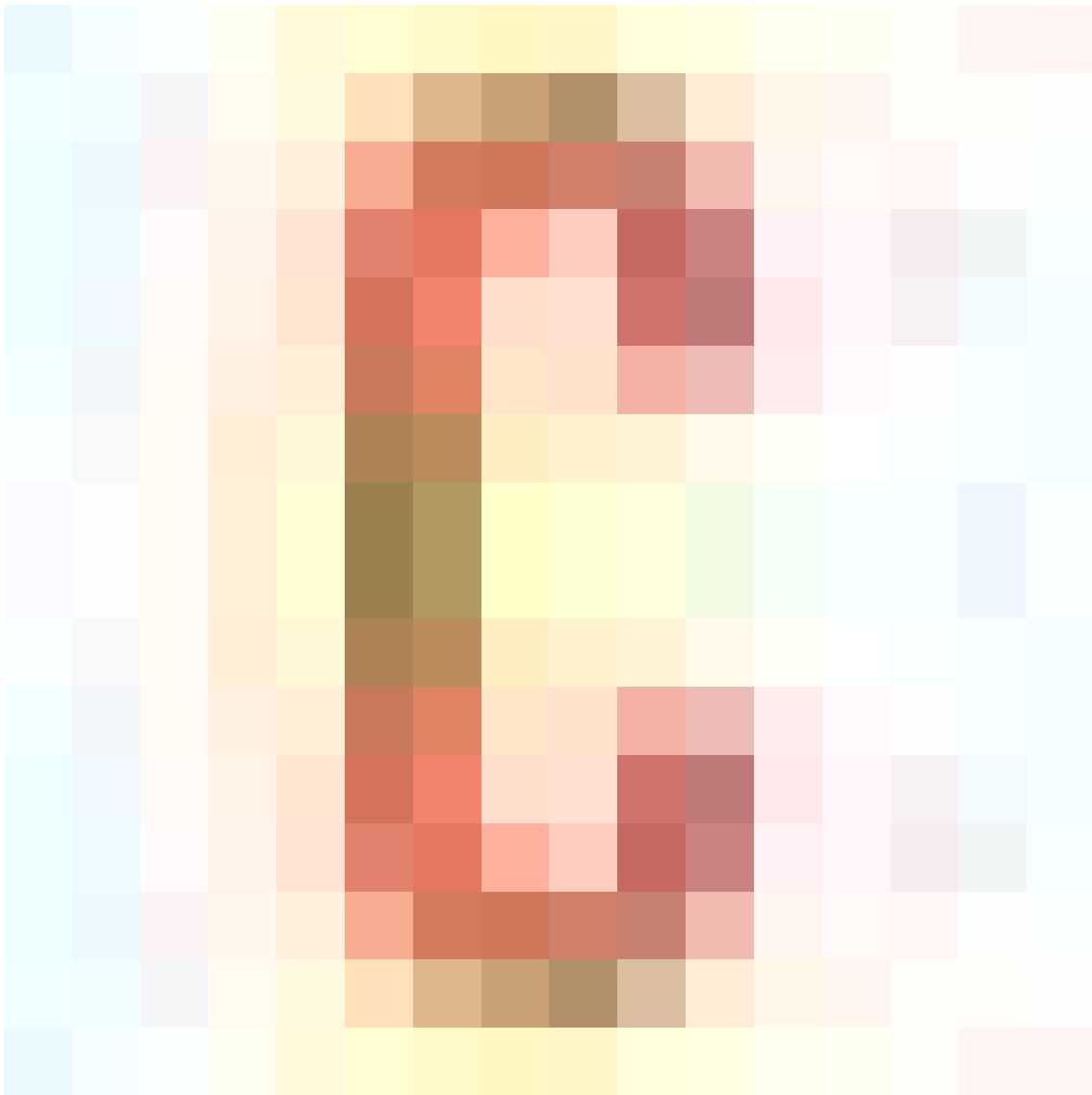
Marilyn Suey is a Registered Representative with and Securities and Retirement Plan Consulting Program advisory services offered through LPL Financial, a registered investment advisor, and a member of FINRA/SIPC. Other advisory services are offered through Mariner Independent Advisor Network, LLC, a 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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