



207•873•2200
129 Silver Street, Waterville, Maine 04901
www.goldenpondwealth.com

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Forbes Best-In-State Wealth Advisors List- Ranked #4 for Maine

We are proud to share that our founder and managing director, Brian Bernatchez, CFP®, has been named to the Forbes Best-In-State Wealth Advisors list. Although Forbes recognizes the individual financial advisor, being named to the list for the sixth consecutive year is a testament to the achievements of our entire team, and most importantly, the relationships we have with you.

We strive every day to achieve the highest standards of personal service, and this recognition is a reflection of that commitment. We look forward to our continued collaborative efforts to serve you and plan for your family's or institution's future. Thank you for your continued trust and confidence in our firm. To see Forbes' complete list and for more information about the selection process please [click here](#).



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Data provided by SHOOK® Research, LLC – Data as of 6/30/24. Forbes America's Top Wealth Advisors and Best-in-State Wealth Advisors ranking was developed by SHOOK Research and is based on in-person, virtual, and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes: client impact, industry experience, credentials, review of compliance records, firm nominations; and quantitative criteria, such as: assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. SHOOK's research and rankings provide opinions intended to help investors choose the right financial advisor and are not indicative of future performance or representative of any one client's experience. Past performance is not an indication of future results. Neither Forbes nor SHOOK Research receive compensation in exchange for placement on the ranking. For more information, please see www.SHOOKresearch.com. SHOOK is a registered trademark of SHOOK Research, LLC