

2021 SAN FRANCISCO EAST BAY FIVE STAR AWARD WINNERS



These days, it takes a village to manage your financial world. Whether it is managing your assets with a wealth manager, navigating the ever-changing tax landscape, writing out your estate and succession planning or picking the right life insurance, finding the right team can be a daunting task. In fact, many consumers have a hard time figuring out where to even begin.

Sometimes, a few simple questions can put you on the right path. Asking a professional what makes working with them a unique experience can help you understand how they work and if their style meshes with your own.

This is a great place to start! Five Star Professional uses its own proprietary research methodology to name outstanding professionals, then works with publications such as *Forbes* magazine to spread the word about award winners. Each award candidate undergoes a thorough research process (detailed here) before being considered for the final list of award winners. For the complete list of winners, go to www.fivestarpromotional.com.

RESEARCH DISCLOSURES

In order to provide a fair overview of high-quality wealth managers, award candidates are identified by one of three sources: 1) nomination, 2) nomination or qualification based on money spending, and 3) nomination or nomination based on research. All three sources are used to identify award winners and financial research data candidates are eligible for the award nomination process for the Five Star Professional Award.

- The Five Star Professional Award is a proprietary award given to the top 100 wealth managers in the United States.
- All nominees are ranked by the Five Star Professional Award based on their performance in the industry.
- The award is a professional designation that is not a certification or a license. It is a recognition of excellence in the industry.
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FIVE STAR WEALTH MANAGER DETERMINATION OF AWARD WINNERS CRITERIA

Award candidates are eligible to apply for the award if they meet the following criteria: 1) Five Star Wealth Manager, 2) Five Star Wealth Manager, 3) Five Star Wealth Manager, 4) Five Star Wealth Manager, 5) Five Star Wealth Manager, 6) Five Star Wealth Manager, 7) Five Star Wealth Manager, 8) Five Star Wealth Manager, 9) Five Star Wealth Manager, 10) Five Star Wealth Manager, 11) Five Star Wealth Manager, 12) Five Star Wealth Manager, 13) Five Star Wealth Manager, 14) Five Star Wealth Manager, 15) Five Star Wealth Manager, 16) Five Star Wealth Manager, 17) Five Star Wealth Manager, 18) Five Star Wealth Manager, 19) Five Star Wealth Manager, 20) Five Star Wealth Manager, 21) Five Star Wealth Manager, 22) Five Star Wealth Manager, 23) Five Star Wealth Manager, 24) Five Star Wealth Manager, 25) Five Star Wealth Manager, 26) Five Star Wealth Manager, 27) Five Star Wealth Manager, 28) Five Star Wealth Manager, 29) Five Star Wealth Manager, 30) Five Star Wealth Manager, 31) Five Star Wealth Manager, 32) Five Star Wealth Manager, 33) Five Star Wealth Manager, 34) Five Star Wealth Manager, 35) Five Star Wealth Manager, 36) Five Star Wealth Manager, 37) Five Star Wealth Manager, 38) Five Star Wealth Manager, 39) Five Star Wealth Manager, 40) Five Star Wealth Manager, 41) Five Star Wealth Manager, 42) Five Star Wealth Manager, 43) Five Star Wealth Manager, 44) Five Star Wealth Manager, 45) Five Star Wealth Manager, 46) Five Star Wealth Manager, 47) Five Star Wealth Manager, 48) Five Star Wealth Manager, 49) Five Star Wealth Manager, 50) Five Star Wealth Manager, 51) Five Star Wealth Manager, 52) Five Star Wealth Manager, 53) Five Star Wealth Manager, 54) Five Star Wealth Manager, 55) Five Star Wealth Manager, 56) Five Star Wealth Manager, 57) Five Star Wealth Manager, 58) Five Star Wealth Manager, 59) Five Star Wealth Manager, 60) Five Star Wealth Manager, 61) Five Star Wealth Manager, 62) Five Star Wealth Manager, 63) Five Star Wealth Manager, 64) Five Star Wealth Manager, 65) Five Star Wealth Manager, 66) Five Star Wealth Manager, 67) Five Star Wealth Manager, 68) Five Star Wealth Manager, 69) Five Star Wealth Manager, 70) Five Star Wealth Manager, 71) Five Star Wealth Manager, 72) Five Star Wealth Manager, 73) Five Star Wealth Manager, 74) Five Star Wealth Manager, 75) Five Star Wealth Manager, 76) Five Star Wealth Manager, 77) Five Star Wealth Manager, 78) Five Star Wealth Manager, 79) Five Star Wealth Manager, 80) Five Star Wealth Manager, 81) Five Star Wealth Manager, 82) Five Star Wealth Manager, 83) Five Star Wealth Manager, 84) Five Star Wealth Manager, 85) Five Star Wealth Manager, 86) Five Star Wealth Manager, 87) Five Star Wealth Manager, 88) Five Star Wealth Manager, 89) Five Star Wealth Manager, 90) Five Star Wealth Manager, 91) Five Star Wealth Manager, 92) Five Star Wealth Manager, 93) Five Star Wealth Manager, 94) Five Star Wealth Manager, 95) Five Star Wealth Manager, 96) Five Star Wealth Manager, 97) Five Star Wealth Manager, 98) Five Star Wealth Manager, 99) Five Star Wealth Manager, 100) Five Star Wealth Manager.

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FIVE STAR PROFESSIONAL PROPRIETARY RESEARCH PROCESS

NOMINATION OF CANDIDATES
Three sources of nomination:
- Firm nomination - Reputation based on industry credentials
- Peer nomination

REGULATORY CONSUMER COMPLAINT REVIEW
All candidates are reviewed by regulatory bodies.

CANDIDATE SUBMISSION OF PRACTICE INFORMATION
Candidates must complete either an online or hard-copy practice information.

EVALUATION OF CANDIDATE PRACTICE
Candidates are evaluated by 10 objective evaluation and eligibility criteria.

FIRM REVIEW OF AWARD CANDIDATE LIST
All candidates are reviewed by a representative of their firm before final selection.

FINALIZATION AND ANNOUNCEMENT OF WINNERS





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