NEMES RUSH
FAMILY WEALTH MANAGEMENT

ACCOLADES

Forbes: The Forbes ranking of America's Top RIA Firms, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone, virtual and in-person due diligence interviews, and quantitative data. The algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices and approach to working with clients. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings. Basic requirements include a minimum of 7 years as an advisor for 1 partner/principal, fully operational as a practice for a minimum of 1 year, must incorporate a fiduciary model, completion of online survey and interview with SHOOK, evaluations focused on wealth management, and acceptable compliance record. Neither Nemes Rush Family Wealth Management nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Nemes Rush Family Wealth Management is not affiliated with Forbes or Shook Research, LLC.

Forbes: The Forbes ranking of Best-In-State Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative criteria learned through telephone, virtual and in-person due diligence interviews, and quantitative data such as revenue trends and assets under management. The algorithm additionally weighs factors such as service models, compliance records and industry experience, and focuses on those that encompass best practices in their approach to working with clients.
All advisors that are considered have a minimum of seven years of experience. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Nemes Rush Family Wealth Management nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Nemes Rush Family Wealth Management is not affiliated with Forbes or Shook Research, LLC.

AdvisorHub: Participation in Advisor Hub's 50 Advisors to Watch (Over $1B) is open to all firms and advisors. Nominees are required to have a minimum of seven years experience, $100m minimum AUM, and a clean regulatory record. Using data on assets, households, and production, AdvisorHub ranks advisors in three categories: scale, growth, and professionalism.
Scale. This is the traditional metric used in most rankings. It's essentially the size of the business and its profitability. AdvisorHub also considered staffing, clientele, and several other factors. This in aggregate provides a snapshot of the size and sophistication of a practice.
Growth. This includes the year-over-year change in assets, households, and production. AdvisorHub tries to bias for organic growth over mergers and acquisitions, and AdvisorHub factors in market conditions. We want practices that are growing aggressively regardless of their size.
Professionalism. This includes the lead advisor's regulatory record, community involvement, and the overall team makeup. AdvisorHub thinks it's important for the future of the industry that advisors perform their duties ethically, are a positive force within their firms, and communities, and have open hiring practices.
This methodology levels the playing field for advisors. While large and sophisticated practices are at a natural advantage, they also need healthy growth to maintain that advantage. The list is broken into several sublists: RIAs (fee-only), Over $1b, Under $1b, Next Gen, Women, Solo, and Fast-Growing. These subcategories compensate for the wide range of business models in the industry.
Participation in this ranking is free, and AdvisorHub receives no compensation from participating advisors.

Barron's: The Barron's America's Top 1,200 Advisors rankings are based on data provided by over 4,000 individual advisors and their firms and include qualitative and quantitative criteria. Data points that relate to quality of practice include professionals with a minimum of 7 years financial services experience, acceptable compliance records (no criminal U4 issues), client retention reports, charitable and philanthropic work, quality of practice, designations held, offering services beyond investments offered including estates and trusts, and more. Financial Advisors are quantitatively rated based on varying types of revenues produced and assets under management by the financial professional, with weightings associates for each. Investments performance is not an explicit component because not all advisors have audited results and because performance figures often are influenced more by clients' risk tolerance than by an advisor's investment picking abilities. The ranking may not be representative of any one client's experience, is not an endorsement, and is not indicative of the advisor's future performance. Neither Nemes Rush Family Wealth Management not any of its Financial Advisors pay a fee in exchange for this award rating. Barron's is not affiliated with Nemes Rush Family Wealth Management.

Financial Times: The Financial Times 400 is intended to provide a snapshot of the best financial advisers for the investors who use them. The Financial Times assesses these advisers based on what investors care about and uses a quantifiable, objective methodology. The minimum criterion for this list is advisers with more than 10 years' experience and $300m or more in assets under management. The FT collects information from the qualifying advisers via a short questionnaire and adds the information to its own research on the candidates, including data from regulatory filings. The formula the FT uses to grade advisers is based on six broad factors and calculates a numeric score for each adviser. These factors are Assets Under Management, AUM Growth Rate, Years of Experience, Compliance Record, Industry Certifications & Online Accessibility. The FT presents the FT 400 as an elite group, not a competitive ranking. Nemes Rush Family Wealth Management is not affiliated with The Financial Times or Ignites Research. Neither Nemes Rush Family Wealth Management not any of its Financial Advisors pay a fee in exchange for this award rating.