



*AdvisoryHQ uses a multi-step selection methodology for identifying, researching, and generating its list of top ranked firms. AdvisoryHQ's review and ranking articles are always 100% independently researched and objectively written.*

*Firms do not pay for their ranking. In fact, most firms do not even realize that they are being reviewed and ranked by AdvisoryHQ until after their reviews have been completed and published to the public. Below is a step-by-step overview of AdvisoryHQ's methodology process.*

*Step 1: Using publicly available sources, AdvisoryHQ identifies a wide range of firms that are providing services in a designated area (city, state, or local geographic location).*

*Step 2: AdvisoryHQ's review team then applies initial methodology filters to narrow down the list of identified firms/products. These filters include company strengths, trustworthiness, transparency, professional reputation, managed asset, ROI/ROA effectiveness, fees structure, what customers/clients are saying about the organization, and many more.*

*Step 3: After trimming down the initial list, AdvisoryHQ then conducts a deep-dive assessment of the remaining firms.*

*The award criteria takes into account a range of factors, including experience level, level of customization, site quality, resources, features, range of provided services, innovation, value-added, and many more factors, to build up a broad picture of what each firm or product has to offer, before the final selection process occurs.*

*Step 4: Based on the results of the performed assessment, AdvisoryHQ's research and selection team then finalizes the list of entities that make it into its top rated publications, which are then published to the general public.*