



Forbes Best Lists:

The Forbes ranking of America's Top Wealth Advisors was developed by SHOOK Research, a research organization focused on the quality of the advisor. It is based on advisor experience and an algorithm that measures both qualitative benchmarks gleaned through telephone and in-person interviews along with quantitative data. Specific factors that were examined include: revenue trends, assets under management, compliance records, use of team, client retention and best practices in working with clients.

Each advisor—selected by SHOOK Research—is chosen based on an algorithm of qualitative and quantitative criteria, including:

In-person interviews

Industry experience

Compliance records

Revenue produced

Assets under management

Charlotte Business Journal 40 under Forty:

Evaluation Criteria

The best candidates will quantitatively demonstrate:

- Business success (financial results, career growth)
- Community involvement (volunteer work, advocacy)
- Leadership ability (public profile, reputation)
- Influence (impact on the region, on public policy, or on quality of life).

Eligibility

Nominees must be under 40 years of age on May 31, of that year.

Nominees must also be residents and employees in the Greater Charlotte region, defined by the following counties:

In North Carolina: Alexander, Anson, Cabarrus, Catawba, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly and Union.

In South Carolina: Chester, Chesterfield, Lancaster and York.

Advisors with Heart Award:

WealthManagement.com editors, board members and writers choose the winners; there are no spreadsheet calculations. Nominations require a short essay explaining the nominee's merits. Be brief—a page will suffice. Specifics are important; please include anecdotes that illustrate the advisor's strongest qualities and commitment to philanthropic activities. Please also describe the kind of practice the wealth advisor runs so that we have a clear understanding of their values. All applications are confidential—and you can self-nominate.

In addition, applicants must have:

- A minimum of three years in the industry
- A clean ethical record (please include full names)
- No previous award winners may apply

Charlotte Agenda 30 under 30:

The Agenda set out to recognize 30 people who have made an impact on Charlotte before the age of 30. You, our readers, submitted scores of names. Our team discussed, debated and dissected the nominees for weeks before arriving at this list.

Acquisition International Finance Awards

STEP 1: GATHERING NOMINEES

Nominees are gained via our online nomination form from magazine subscribers, online visitors, social media following, clients and our wider circulation.

Those putting forward nominees are welcome to nominate their own firm or colleagues within their firm as well as third party businesses.

Acquisition International is part of the publishing house AI Global Media, the publishers also put forward nominees for consideration.

STEP 2: EVALUATING THE NOMINEES

All those who formally accept their nomination will be asked if they would like to submit material for further consideration as supporting evidence.

We consider materials supplied by nominees, information on those nominated businesses available online and any information supplied with the original nomination.

STEP 3: RESEARCH AND JUDGING

Our research team who are highlighted below will assess all information presented when it comes to determining winners.

The team gather information independently from a number of publicly available sources, they will assess the material supplied by the nominees and by those who put them forward originally.

They will cast their final judgment based on various criteria including client dedication, innovation, business growth, longevity, online reputation, client feedback and business performance.

STEP 4: CONTACTING AND ANNOUNCING THE WINNERS

Once winners have been determined each winner will be contacted directly.

Details of those winners will be embargoed until Acquisition International formally announce the winners publicly via the website and award winners' magazine.