

## **Ranking and Award Disclosures**

### **Forbes America's Top Wealth Advisors & Best-In-State Wealth Advisors (2026)**

Source: Forbes.com (Awarded April 2026). This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) for the period 6/30/24-6/30/25. Neither Wealth Advisors of Iowa nor its Financial Advisors paid a fee to SHOOK Research LLC for placement on its rankings. This ranking is based on in-person, virtual and telephone due diligence meetings to evaluate each Financial 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, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of SHOOK Research LLC and may not be representative of any one client's experience; investors must carefully choose the right Financial Advisor or team for their own situation and perform their own due diligence. This ranking is not indicative of the Financial Advisor's future performance. Wealth Advisors is not affiliated with SHOOK Research LLC, or Forbes. For more information, see [www.SHOOKresearch.com](http://www.SHOOKresearch.com).

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### **InvestmentNews' 40 Under 40 (2015)**

Source: InvestmentNews.com (Awarded June 2015). Investment News' "40 under 40" seeks to recognize top financial advisers and associated professionals who are under the age of 40. For this Award, nominees are cast through an online web form. Investment News' editorial staff based the evaluation on the following key criteria: accomplishments, contributions, leadership, and promise. Nominees were evaluated on these criteria as of the end of April 2015. Neither Wealth Advisors of Iowa nor any other participating associates paid a fee to be eligible for the "40 under 40" Award. For 2015, Investment News received approximately 1,200 nominations to be considered for the Award and forty honorees were ultimately selected. Rankings are based on the opinions of InvestmentNews and may not be representative of any one client's experience; investors must carefully choose the right Financial Advisor or team for their own situation and perform their own due diligence. This ranking is not indicative of the Financial Advisor's future performance. Wealth Advisors is not affiliated with InvestmentNews. For more information, see [www.InvestmentNews.com](http://www.InvestmentNews.com).