

FOR IMMEDIATE RELEASE

Contact

Marion Steward

303-444-5440

financial.steward@lpl.com

FORBES RECOGNIZES MARION STEWARD AS A BEST-IN-STATE WEALTH ADVISOR

Boulder, CO – June 2026 – Marion Steward, CFP®, an independent LPL Financial advisor in **Boulder, CO**, has been recognized in this year's list of the **Forbes/SHOOK Best-in-State Wealth Advisors** for her track record of success in the financial services industry. Steward, CEO and Founder of **Financial Steward Associates, LLC** was recognized as the No. 36 woman advisor in Colorado and the No. 68 wealth advisor overall statewide.

The annual list is compiled by Forbes with insights from SHOOK Research. Advisors are selected based on quantitative and qualitative data, and are assessed on a variety of criteria, including interviews, years of experience, compliance records and assets under management.*

"We are thrilled to extend our heartfelt congratulations to Marion Steward for the well-deserved recognition from Forbes, on behalf of the entire team at LPL," said Peter Vincent, LPL's executive vice president and head of field management. "This award showcases her dedicated efforts in guiding her clients towards financial independence, especially during time of economic uncertainty and global challenges. LPL remains steadfast in our commitment to supporting ambitious advisors like Marion, equipping them with robust investment solutions, advanced technology platforms, and extensive resources to provide dynamic service and experiences for their clients."

Marion Steward has nearly 30 years of experience in the financial services industry and provides a full range of financial services for individuals, families and business owners; including retirement and financial planning, individual money management, alternative investments, annuities and more.

It is the mission of Financial Steward Associates to make a meaningful difference in the lives of the families they serve. They believe financial planning is about more than numbers – it's about building trust, creating clarity, and helping clients approach life's decisions with greater confidence. Guided by their values of integrity, excellence, and connection, they provide thoughtful planning and advice designed to support the financial journey of their clients.

Steward is a financial advisor affiliated with LPL Financial, a leading wealth management firm that supports financial advisors - whether they work as independent business owners, with an RIA firm or in a financial institution - so they take care of their clients and run a thriving business.

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About Financial Steward Associates, LLC

Financial Steward Associates, LLC is an independent financial services firm headquartered in Boulder, Colorado, and founded in 2000. The firm provides comprehensive financial planning and investment management services, specializing in retirement income planning and guiding families through the transition into retirement. Services include retirement and income strategies, tax-efficient investment management, estate and legacy planning, charitable giving, and education planning.

The team of advisors and client service professionals works collaboratively to deliver systematic, friendly, and relationship-focused support. Financial Steward Associates, LLC primarily serves affluent near-retirement couples with \$1M+ in investable assets. For more information, please visit financialstewardassociates.com.

About LPL Financial

LPL Financial Holdings Inc. (Nasdaq: LPLA) is among the fastest growing wealth management firms in the U.S. As a leader in the financial advisor-mediated marketplace, LPL supports over 32,000 financial advisors and the wealth management practices of approximately 1,200 financial institutions, servicing and custodialing approximately \$2.4 trillion in brokerage and advisory assets on behalf of approximately 8 million Americans. The firm provides a wide range of advisor affiliation models, investment solutions, fintech tools and practice management services, ensuring that advisors and institutions have the flexibility to choose the business model, services, and technology resources they need to run thriving businesses. For further information about LPL, please visit www.lpl.com.

Securities and advisory services offered through LPL Financial LLC (“LPL Financial”), a registered investment advisor and broker-dealer, member FINRA/SIPC. Other advisory services offered through Financial Steward Associates, LLC, a separate entity.

Certified Financial Planner Board of Standards Center for Financial Planning, Inc. owns and licenses the certification mark CFP® in the United States to Certified Financial Planner Board of Standards, Inc., which authorizes individuals who successfully complete the organization’s initial and ongoing certification requirements to use the certification mark.

Financial Steward Associates, LLC, Forbes, Shook Research, and LPL Financial are all separate entities.

Throughout this communication, the terms “financial advisors” and “advisors” are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial.

Additional Disclosures Provided by SHOOK® Research, LLC

The Forbes | SHOOK® America's Top Wealth Advisors and Best-in-State Wealth Advisors rankings were developed by SHOOK Research, LLC. Data as of June 30, 2025. Published by Forbes (April 2026). The rankings are based on SHOOK Research's independent methodology and ranking algorithm, which includes in-person, virtual and telephone due diligence meetings to qualitatively evaluate each advisor across criteria such as client impact, industry experience, client retention, review of best practices, credentials, compliance records and firm nominations, as well as quantitative factors including assets under management and revenue generated for their firms. Investment performance is not a criterion, as client objectives and risk tolerances vary and advisors rarely have audited performance reports. SHOOK Research's rankings provide opinions intended to help investors choose the right financial advisor and are not indicative of future performance or representative of any one client's experience. Past performance is not indicative of future results. SHOOK Research's rankings is for informational purposes only and should not be construed as a recommendation or endorsement to hire any specific investment advisor and SHOOK Research does not assume any liability for actions taken based on the rankings. Neither SHOOK Research nor Forbes receives compensation in exchange for placement on the rankings, but awardees have the option to purchase rights to use the award logo or additional marketing packages to promote their award. For a full description of the methodology, please visit www.SHOOKresearch.com. SHOOK® is a registered trademark of SHOOK Research, LLC.

Out of 52,043 number of nominations, 11,302 U.S. advisors received this recognition.