

Awards and recognitions are independently determined and awarded by their respective publications. Reliant Wealth Planning nor its employees pay a fee in return for the award or recognition.

### ***Forbes Best In State Top Wealth Advisors - Kentucky***

The *Forbes* ranking, developed by SHOOK Research, is based on an algorithm that weights factors such as revenue trends, assets under management, compliance records and industry experience. For more details on the Methodology: <https://www.forbes.com/sites/rjshook/2019/09/10/methodology-americas-top-wealth-advisors-2019/#72256b55440b>

### ***Forbes Top Women Wealth Advisors***

The *Forbes* ranking, developed by SHOOK Research is based on an algorithm of: qualitative data, such as telephone and in-person interviews, a review of best practices, service and investing models, and compliance records; as well as quantitative data, like revenue trends and assets under management. All advisors have a minimum of seven years' experience. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. For more details on the Methodology: <https://www.forbes.com/sites/rjshook/2020/04/21/the-2020-forbes-ranking-of-americas-top-women-wealth-advisors-methodology/#1e3f658d487f>

### ***Business First Largest Financial Advisory Firm***

The *Business First* ranking is based on number of financial advisors at local firms. Local is defined as the Louisville area of Jefferson, Bullitt, Oldham and Shelby counties in Kentucky, and Clark, Floyd and Harrison counties in Indiana.

### ***Business First Corporate Philanthropic Award – Small Company***

The *Business First* award is awarded to Louisville-area businesses for their financial support of charities and worthy causes. The most generous companies in three categories – small, medium and large – are recognized.

### ***Business First 40 Under 40***

The *Business First* award is an annual program honoring regional young leaders. To be awarded this honor, one must be nominated and then complete a questionnaire that asks about career achievements and community accomplishments. Winners are chosen by a group of past 40 Under 40 honorees.

### ***CFA® and CIPM® Designations***

CFA® and CIPM® are registered trademarks owned by the CFA Institute. For more details on qualifications for these designations: <https://www.cfainstitute.org/>