



2012 All - Star Team

We began soliciting online nominations for the 2012 All-Star Team from our readers, as well as the financial services community at large (including advisors from RIA, IBD, Bank, Regional and Wirehouse firms, asset managers, broker-dealers, custodians and TAMPs) in early June. The nomination process remained open until late July.

Industry professionals were invited to participate in the nominating process by proposing up to five individuals from the following categories:

- RIAs
- Banks or trust companies
- Wirehouses
- Independent broker-dealers
- Discount broker-dealer
- Asset allocation or manager of managers platforms
- Retirement or insurance products providers

Over 600 total nominations were received. The following criteria was considered:

- Number of nominations. (Nominations outside the nominee's firm were weighted more heavily.)
- Comments from nominators regarding nominee's investment philosophy, process for security selection and investment recommendation performance over the last five years.
- Reputation of the firm.
- Professional designations held
- Assets under management
- Firm ADV review

The eight winners will be announced in the October issue of *Financial Advisor* magazine, and winners will be recognized at the Second Annual *Financial Advisor/ Private Wealth* Fiduciary Gatekeeper Summit, www.fa-mag.com/firms in Boston, October 11-12, 2012. All 2012 nominees are invited to attend the 2012 Summit free of charge.

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