



Forbes Names Dana as Top Women Wealth Advisor!

Forbes recently announced their 2018 Top Women Wealth Advisors list which spotlights 250 standout financial strategists across the country. Each advisor was chosen based on personal interviews, industry experience, compliance records, client retention and assets under management.

Congratulations to Dana as she was recognized on this list! Over 20,000 nominations were received, and of those nominations, 6,400 were invited to compete and only 250 of the top advisors made the list. Dana's continuous dedication to our clients, integrity and expertise have helped enable RZH to positively influence the trajectory of our clients lives' and their wealth. Please join us in celebrating her achievement and thanking her for all her hard work!



About the Forbes Ranking: The Forbes ranking of America's Top Women Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors with a minimum of seven years of experience and weighing factors like revenue trends, assets under management, compliance records, industry experience and best practices learned through telephone and in-person interviews. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Neither Forbes or SHOOK receive a fee in exchange for rankings.

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Important Disclosures

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