

DECEMBER 14, 2023



RZH*advisors*

RZH SPECIAL MEMO

AND...WE'RE BACK!

We are excited to share that RZH Advisors has earned a spot on the prestigious 2023 Forbes|SHOOK list of “America’s Top RIA Firms.” Out of over 15,000 RIA (Registered Investment Advisor) firms nationwide, we have been ranked within the top 1%. This honor reflects our team's unwavering commitment, hard work and capabilities, as well as the invaluable trust and confidence our clients have bestowed upon us.

At RZH, our goal has always been to deliver tailor-made, thoughtful financial guidance that caters to the distinct needs of each client. Being recognized by Forbes|SHOOK not only celebrates our achievements thus far but also inspires us to continue setting higher standards and help our clients embrace life to the full extent of their wealth.

A heartfelt THANK YOU to our clients for your trust and confidence, which means the world to us. We also wish to express our deepest gratitude to our dedicated team members, whose tireless efforts, great skill, and steadfast dedication to client success are pivotal in attaining this accolade.

To review the complete Forbes|SHOOK list of Top RIA Firms and important ranking methodology please [CLICK HERE](#).

Best regards,

A handwritten signature in black ink, appearing to read "Carl".

Carl J. Zuckerberg, CFP®, AIF®, CIMA®
Principal, Chief Investment Strategist

Important Disclosure Information

Please remember that past performance may not be indicative of future results. Different types of investments involve varying degrees of risk, and there can be no assurance that the future performance of any specific investment, investment strategy, or product (including the investments and/or investment strategies recommended or undertaken by RZH Advisors (“RZH”), or any non-investment related content, made reference to directly or indirectly in this commentary will be profitable, equal any corresponding indicated historical performance level(s), be suitable for your portfolio or individual situation, or prove successful. Due to various factors, including changing market conditions and/or applicable laws, the content may no longer be reflective of current opinions or positions. Moreover, you should not assume that any discussion or information contained in this commentary serves as the receipt of, or as a substitute for, personalized investment advice from RZH. Please remember to contact RZH, in writing, if there are any changes in your personal/financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services. RZH is neither a law Firm, nor a certified public accounting Firm, and no portion of the commentary content should be construed as legal or accounting advice. A copy of the RZH’s current written disclosure Brochure discussing our advisory services and fees continues to remain available upon request, or at www.rzhadvisors.com.

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**** 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.***