

FEBRUARY 22, 2023



RZH NAMED TO THE RIA EDGE 100 LIST!

We are thrilled to announce that RZH Advisors has been named to the WealthManagement.com inaugural "RIA Edge 100", a selection of top independent wealth management firms!

The RIA Edge 100 identifies "firms that are seeing the most success while continuing to provide high-quality, hands-on service to an expanding client base. These are the firms that are continuing to put clients first, while they invest in their businesses and their people..."

We are honored to be included among these top independent firms (there are roughly 15,000 RIAs in the country) and affirms our commitment to providing outstanding client service. This achievement is only possible thanks to the support and confidence that our clients and business partners have placed in us.

To review the complete list and selection methodology, please click on the link to read the WealthManagement.com article below.



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.

Historical performance results for investment indices, benchmarks, and/or categories have been provided for general informational/comparison purposes only, and generally do not reflect the deduction of transaction and/or custodial charges, the deduction of an investment management fee, nor the impact of taxes, the incurrence of which would have the effect of decreasing historical performance results. It should not be assumed that your RZH account holdings correspond directly to any comparative indices or categories. Please Also Note: (1) performance results do not reflect the impact of taxes; (2) comparative benchmarks/indices may be more or less volatile than your RZH accounts; and, (3) a description of each comparative benchmark/index is available upon request.

Please Note: Limitations: Neither rankings and/or recognitions by unaffiliated rating services, publications, media, or other organizations, nor the achievement of any designation, certification, or license should be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if RZH is engaged, or continues to be engaged, to provide investment advisory services. Rankings published by magazines, and others, generally base their selections exclusively on information prepared and/or submitted by the recognized adviser. Rankings are generally limited to participating advisers (see link as to participation data/criteria, to the extent applicable). Unless expressly indicated to the contrary, RZH did not pay a fee to be included on any such ranking. No ranking or recognition should be construed as a current or past endorsement of RZH by any of its clients. **ANY QUESTIONS:** RZH's Chief Compliance Officer remains available to address any questions regarding rankings and/or recognitions, including the criteria used for any reflected ranking.

** 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.*