

MARCH 5, 2024



RZH SPECIAL MEMO

INVESTMENTNEWS NAMES CARL AS TOP ADVISOR

RZH Advisors is pleased to announce that Carl Zuckerberg, Founding Principal, has been selected for the inaugural 2024 InvestmentNews Top Financial Advisors award. This award highlights some of the industry's finest advisors who provide clients with trusted advice, unbiased investment options, and a plethora of value-added services.

As an impartial authority in the wealth sector, InvestmentNews conducted an exhaustive research study spanning 12 months to identify and showcase the industry's top performers. In this thorough assessment, Carl has emerged as one of the Top 10 financial advisors in the industry.

To compile the inaugural Top Advisors list, InvestmentNews first solicited nominations from advisors, industry professionals, and clients. Only advisors nominated were eligible for the list. All information on nominees had to be verified by their compliance team before it could be accepted.

The final list was determined based on each advisor's weighted ranking in overall Assets Under Management, Asset Under Management Growth, and Client Growth (between September 2022 and September 2023). The InvestmentNews team then tabulated a ranking for each advisor in each category and combined those scores to determine the advisor's final ranking on the 2024 Top Advisors list.

As Carl puts it, this award is really a reflection of RZH. "I must emphasize that this achievement is not solely mine to claim. It is a testament to the remarkable team of professionals at RZH Advisors. Our success in delivering exceptional results for our clients stems from the collective efforts of our talented and dedicated individuals. No one person can take credit for our accomplishments."

At RZH, we take pride in our outstanding team and the camaraderie we share as we pursue our mission of helping clients embrace life to the full extent of their wealth. Serving you is a privilege we hold dear, and we are grateful for the opportunity to be a part of your journey.

Thank you for entrusting us with your financial well-being.

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.*