

MAY 23, 2024



RZH SPECIAL MEMO

CARL ZUCKERBERG NAMED AS A BARRON'S TOP 1200 FINANCIAL ADVISOR

RZH Advisors proudly announces that Carl Zuckerberg, Co-Founder and Chief Investment Strategist, has been recognized by Barron's as one of the Top 1200 Financial Advisors for 2024. This prestigious accolade is a testament to Carl's dedication to our clients - striving to continuously improve their lives and strengthen their financial position.

Barron's, one of the most respected publications in the financial industry, conducts an extensive review process to identify the top financial advisors across the United States. Their methodology includes assessing factors such as quality of practice, business growth, regulatory record, assets under management, and philanthropic work. Carl's inclusion in this notable list highlights both his and RZH's commitment to clients and their financial success.

With over 30 years of experience in the financial services industry, Carl guides the firm's investment management and portfolio construction process. He is known for his holistic, yet disciplined, approach to investment management and his ability to demystify investing while crafting solutions to meet each client's unique needs and goals. And, just like the numerous accolades Carl has received in the past, this recognition belongs to every team member at RZH.

"I am grateful to be named to Barron's Top 1200 Financial Advisors for 2024," said Carl. "However, this recognition really reflects the trust and confidence that our clients have placed in all of us at RZH Advisors. It is truly our remarkably talented team, who collectively, produce such outstanding results for those we serve."

Congratulations Carl and thank you for helping RZH clients embrace life to the full extent of their wealth!

To learn more about the methodology used by Barrons for the Top 1200 Financial Advisors ranking please click [HERE](#).

1. Barron's "2024 Top 1200 Advisor Rankings by State" was published on March 15, 2024, based on assets under management, revenue produced for the firm, regulatory record, quality of practice, and philanthropic work as of September 30, 2023. The data used in this ranking is provided by individual advisors in conjunction with regulatory databases. No compensation was exchanged in consideration for this ranking.