

OCTOBER 10, 2024



RZH SPECIAL MEMO

RZH Advisors Named a Top RIA Firm by Forbes|Shook in 2024

RZH Advisors is excited to announce that we have been recognized as one of America's Top Registered Investment Advisors (RIA) for 2024 by Forbes, in partnership with SHOOK Research, for the second year in a row!^[1] This prestigious ranking highlights RZH Advisors' commitment to providing a differentiated wealth management experience and life-changing outcomes for our clients.

"We are truly honored to be included in the Forbes/SHOOK list of top RIA firms," said Carl Zuckerberg, Founding Principal of RZH Advisors. "This recognition is a testament to the dedication of our entire team and their passion for helping our clients live life to the fullest and optimize their wealth."

The Forbes|SHOOK ranking process is based on a rigorous methodology that includes both qualitative and quantitative factors such as client retention, revenue trends, assets under management, and industry experience. Firms are also assessed on their compliance records and best practices in client service.

This recognition further solidifies RZH Advisors' position as a leader in the wealth management industry, and the firm remains committed to building long-term relationships with clients through a collaborative and client-centric approach.

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 devoted team members, whose tireless efforts, great skill, and steadfast commitment to client success are instrumental in attaining this accolade.

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

^[1] Forbes|SHOOK 2024 America's Top RIA Firms published October 8, 2024, using data from June 30, 2024. RZH Advisors did not provide or receive compensation for inclusion in this ranking.

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.*