

“USA TODAY’s *Best Financial Advisory Firms 2024*” was published on April 23, 2024, and is a ranking of registered investment advisory firms prepared by USA Today and Statista, Inc. The ranking is based on recommendations by financial advisors, clients and industry experts and a firm’s development of Assets Under Management (AUM). Recommendations were collected via an independent survey among over 25,000 individuals, and self-recommendations were prohibited. AUM development was analyzed both in the short-and long-term using publicly available data from the SEC IAPD regulatory database. Short-term AUM development was calculated over a twelve-month period from January 2023 to January 2024, while long-term development spanned a five-year period from 2019 to 2024. The 500 RIA firms with the highest score were awarded as USA TODAY’s *Best Financial Advisory Firms*. Organizations do not pay for, or need to apply, to appear on this list. Blue Chip Partners paid a license fee to USA TODAY to publicize the ranking. For more information on the methodology used visit <https://www.bluechippartners.com/wp-content/uploads/2024/08/Methodology-USA-TODAY-Best-Financial-Advisory-Firms-2024.pdf>.

“CityWire 50 Growers Across America” recognizes the fastest growing RIA firms across the country. RIA Firms did not apply for consideration. Firms were evaluated based on the most recent Form ADV data reported to the Securities and Exchange Commission at the time of publication (November 2021) as gathered by Citywire RIA data partner Discovery Data. Factors considered included, but were not limited to, the number of financial planning clients, lack of broker-dealer affiliation, percentage growth in assets under management and percentage growth of employees since the end of 2016. No fee was paid to CityWire for inclusion in this rating.

“SmartAsset’s Top 50 Fastest Growing Financial Advisor Firms in 2022” is a study by SmartAsset.com (8/1/22), which evaluated 728 firms by focusing on each firm’s organic growth across four metrics: one- and three-year percentage change in number of client accounts and one- and three-year percentage change in assets under management (AUM) as reported to the Securities and Exchange Commission. Firms whose growth occurred as a result of merging with or acquiring other firms were excluded from the study. The study was also limited to firms with at least \$500 million in AUM. No fee was paid to SmartAsset.com for inclusion in this study.

“The Financial Times 300 Top Financial Advisers” is an independent listing produced by the Financial Times (June, 2020, June, 2018 and June, 2017). The FT 300 is based on data gathered from RIA firms, regulatory disclosures, and the Financial Times’ own research. The selection process involved invitations sent to more than 2,000 qualifying Registered Investment Adviser (RIA) firms. The Financial Times evaluated data across six broad topics including total adviser assets under management, asset growth, the company’s age, industry certifications of key employees, SEC compliance record and online accessibility. Each of the data points were scored by the Financial Times, with Blue Chip Partners achieving a position in the top 300 RIA firms nationwide. No fee was paid to the Financial Times in exchange for inclusion in the FT 300.

“Financial Advisor Magazine’s (FA’s) 2023 RIA Ranking” is a ranking that orders firms from largest to smallest, based on AUM reported by firms that voluntarily complete and submit FA’s survey by FA’s deadline. To be eligible for the national ranking, firms must be independent registered investment advisers, file their own Form ADV with the SEC, provide financial planning and related services to individual clients, and have at least \$500 million in assets under Management as of December 31, 2022.

The ranking was published in the July/August 2023 issue of Financial Advisor Magazine. No fee was paid to Financial Advisor Magazine for inclusion in the ranking.

“Crain’s Best Places to Work in Southeast Michigan 2023” was released 8/28/23 by Crains Detroit Business and is a survey and research-driven program in partnership with the Best Companies Group. Best Companies uses an employer questionnaire to examine applicant companies’ practices, programs, and benefits. Afterward, it surveys employees on engagement and satisfaction. Eligible companies are at least one year old, have at least 15 employees, and are located in Wayne, Oakland, Macomb, Washtenaw, Ingham, Livingston, Lapeer, Genesee, St. Clair, Monroe, Lenawee, or Jackson counties. No fee was paid to Crain’s Detroit Business or Best Companies Group for inclusion in the ranking.

Blue Chip Partners’ Managing Partner Dan Seder, CFA, CMT, CFP® was named a finalist for 'Thought Leader of the Year' among Individual RIA Firm Leaders in the 2023 Wealth Management Industry Awards (the Wealthies), an awards program that honors outstanding achievements by companies, organizations, and individuals that support financial advisor success. Companies submit nominations for the awards and winners were announced on September 7, 2023.

The Forbes “America’s Top RIA Firms 2023” (10/10/23) and “ Best-In-State Wealth Advisors” (4/4/23) rankings, developed by SHOOK Research, are based on an algorithm of qualitative criteria, mostly gained through telephone, virtual and in-person due diligence interviews, and quantitative data provided by the RIA firms. The algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices and approach to working with clients. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. All advisors that are considered have a minimum of seven years experience. Neither *Forbes* nor SHOOK receive a fee in exchange for rankings.

Forbes.com “America’s Top Wealth Advisors and Best-in-State Wealth Advisors” rankings awarded in 2024 were developed by SHOOK Research and are based on in-person, virtual, and telephone due diligence meetings to measure best practices, client retention, industry experience, credentials, review of compliance records, firm nominations; and quantitative criteria, such as assets under management and revenue generated for their firms. Investment performance is not a criterion. SHOOK® Research, LLC Data is as of 6/30/23. SHOOK’s research and rankings provide opinions intended to help investors choose the right financial advisor and are not indicative of future performance or representative of any one client’s experience. Past performance is not an indication of future results. Neither Blue Chip Partners, LLC nor its Financial Advisors paid a fee to SHOOK Research LLC for placement on its rankings.