

“The obligation for working mothers is a very precise one: the feeling that one ought to work as if one did not have children, while raising one's children as if one did not have a job.” – Annabell Crabb



SHOOK™ Research considered women advisors with children living at home under 21 years of age. The ranking algorithm is based on qualitative measures derived from telephone, virtual, and in-person interviews and surveys: service models, investing process, client retention, industry experience, review of compliance records, firm nominations, etc. and quantitative criteria, such as assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC. *Neither SHOOK nor Working Mother receives compensation from the advisors or their firms in exchange for placement on a ranking. Research Summary (as of 3/31/2021):* from a total universe of 300,000 advisors, based on our thresholds we received 33,123 nominations, of which approximately 20% (6,624) were women and less than a quarter (1,400) at the time were mothers with children under the age of 21 and living at home. A final list of the top 500 advisors was then compiled based upon the quantitative criteria. Raymond James is not affiliated with Working Mother or Shook Research, LLC. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. For more information see www.shookresearch.com or <https://www.workingmother.com/top-wealth-advisor-moms-2021>.