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Note: The Forbes ranking of Best in State Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative and quantitative data designed to fairly compare the business practices of a large group of 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 criterion due to varying client objectives and lack of audited data. Neither Forbes or SHOOK receive a fee in exchange for rankings. See [Best-In-State Wealth Advisors 2020](#) For additional detail on the criteria Forbes used for the ranking, see [Methodology: Forbes Best-In-State Wealth Advisors](#). The Forbes ranking of America’s Top Next Generation Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors born in 1980 or more recently, with a minimum of four 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 criterion due to varying client objectives and lack of audited data. Neither Forbes or SHOOK receive a fee in exchange for rankings. See [America’s Top Next-Generation Wealth Advisors, State-By-State](#) and [America’s](#)

[Top Next Generation Wealth Advisors](#). For additional detail on the criteria Forbes used for the ranking, see [Methodology: Forbes Top-500 Top Next Generation Wealth Advisors](#).

Note: The Forbes ranking of Top Women Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative and quantitative data designed to fairly compare the business practices of a large group of 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 criterion due to varying client objectives and lack of audited data. Neither Forbes or SHOOK receive a fee in exchange for rankings. See [Top Women Wealth Advisors 2020](#). For additional detail on the criteria Forbes used for the ranking, see [Methodology: Forbes Top Women Wealth Advisors 2020](#). Neither Forbes or SHOOK receive a fee in exchange for rankings.

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As of 2020, advisors who wish to be ranked fill out a survey about their practice. Barron's then verifies that data with the advisors' firms and with regulatory databases and then applies its rankings formula to the data to generate a ranking. The formula Barron's uses to rank advisers is proprietary. It has three major components: assets managed, revenue produced and quality of practice. Investment returns are not a component of the rankings because an adviser's returns are dictated largely by the risk tolerance of clients. In addition, Barron's also considers a wide range of qualitative factors, including the advisors' experience, their advanced degrees and industry designations, the size and shape of their teams, their charitable and philanthropic work and compliance records. BOPW is unaware, nor has Barron's published, the number of nominees considered for the award ranking. In 2020 Michael Henley of BOPW was ranked at 41 in Pennsylvania on the "America's Top 1200 US Financial Advisors" publication. Barron's does not require membership or payment in order for award participants and/or applicants to be considered for an award designation. Moreover, neither BOPW nor any other participating advisers paid a fee to be eligible for the "America's Top 100 Independent Wealth Advisors."

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rankings for 2020 is available at the following links:

List: <https://www.barrons.com/report/top-financial-advisors/1000/2020>

Methodology: <https://www.barrons.com/articles/barrons-top-advisors-methodology-1534541819>

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