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The Forbes Next-Gen Wealth Advisors rankings, developed by [SHOOK Research](#), is based on an algorithm of qualitative criterion—mostly gained through telephone and in-person due diligence interviews—and quantitative data. Those advisors that are considered have a minimum of four years' experience, and the algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass the highest standards of best practices. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings.

The Forbes ranking of America's Top Women Wealth Advisors, developed by SHOOK Research, is based on an algorithm of: qualitative data, such as telephone and in-person interviews, a review of best practices, service and investing models, and compliance records; as well as quantitative data, like revenue trends and assets under management. All advisors have a minimum of seven years' experience. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings.

**Forbes-Ranked Advisors** (ex. Forbes Top 250 Wealth Advisors, Forbes Top Women Wealth Advisors, Forbes Best-in-State Wealth Advisors) **Methodology Summary:** developed by SHOOK Research, is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes: client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: 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 and not indicative of future performance or representative of any one client's experience. For more information on methodology, please visit: <https://www.forbes.com/sites/rjshook/2022/04/07/methodology-forbes-best-in-state-wealth-advisors-2022/?sh=5e1d81147fee>

Barron's publishes four individual advisor rankings each year (Top 100 Advisors, Top 100 Women Advisors, Top 100 Independent Advisors, Top 1,200 Advisors) along with three team- or firm-based rankings, Barron's "Top 100 Women Financial Advisors," (2015-2023). Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved.

**Barron's Top 1,200 Financial Advisors (2016-2022) Methodology Summary:** Barron's state-by-state ranking of the top financial advisors in the United States. Factors included in the rankings are assets under management, revenues generated by advisors for their firms, quality of practices, and philanthropic work. Barron's examines regulatory records, internal company documents, and extensive questionnaires filled out by the advisors themselves. Investment performance isn't explicitly a criterion, because the advisors pursue a wide range of investment goals for their clients. A total of 1,200 advisors were ranked based on data provided by over 4,000 advisors across the nation. In the final list, advisors are ranked by state. The number of advisors included for each state was based on population.

**Barron's List of America's Top Advisors Methodology Summary:** Over 4,000 advisors who wish to be ranked fill out a 102 question survey about their practice, data is then applied to a ranking formula. The ranking reflects the volume of assets overseen by the advisors and their teams, revenues generated for the firms, and the quality

of the advisors' practices. The scoring system assigns a top score of 100 and rates the rest by comparing them with the top-ranked advisor.

For more info on Barron's Top Advisor methodology, please visit: <https://www.barrons.com/articles/barrons-methodology-for-ranking-financial-advisors-51615843316>

**Barron's List of America's Top Independent Advisors Methodology Summary:** Advisors who wish to be ranked fill out a 102-question survey about their practice. We verify that data with the advisors' firms and with regulatory databases and then we apply our rankings formula to the data to generate a ranking. The formula features three major categories of calculations: (1) Assets (2) Revenue (3) Quality of practice. In each of those categories we do multiple subcalculations.

Advisor Hub – Advisors to Watch: Participation is open to all firms and advisors. Nominees are required to have a minimum of seven years experience, \$100m minimum AUM, and a clean regulatory record. Using data on assets, households, and production, we rank advisors on three categories: scale, growth, and professionalism. Scale metrics include relative size of assets, production and quality of service; growth metrics include relative year over year change in assets, clients, and production; professionalism metrics include regulatory record, community involvement and mentorship and team makeup. Participation in this ranking is free and AdvisorHub receives no compensation from the participating advisors.