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MARY BROOKS NAMED TO FORBES' LIST OF BEST-IN-STATE WEALTH ADVISORS

Walnut Creek, CA – Mary Brooks, Senior Vice President, Investments, Managing Director, of Invera Wealth Advisors located at 2999 Oak Rd was among the Raymond James-affiliated advisors named to the *Forbes* list of Best-In-State Wealth Advisors. The list, which recognizes advisors from national, regional and independent firms, was released online January, 16, 2020.

The *Forbes* ranking of Best-In-State Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of seven years' experience, and the algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receives a fee in exchange for rankings. This ranking is not indicative of 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.

Brooks, who joined Raymond James in 2009, has more than 36 years of experience in the financial services industry. She has established a team of experienced, engaged financial professionals focused on delivering investment value in harmony with client's personal value as well as helping them to create a strong, stable financial future. The team achieves this by providing principled, personalized financial advice customized to individual goals and needs. At the same time, they help to create a lasting legacy for their clients by fashioning a portfolio centered on companies with a proven commitment to environmental stewardship, social awareness, and ethical corporate governance.

To reach Brooks or the Invera team, more information can be found at inverawealth.com or by calling 925.952.5258.

About Forbes ranking of Best-In-State Wealth Advisors

Data provided by SHOOKTM Research, LLC. Data as of 6/30/19.
Source: Forbes.com (January, 2020). Forbes Best-in-State Wealth Advisors ranking was developed by SHOOK Research and 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. Neither Forbes nor SHOOK Research receive compensation in exchange for placement on the ranking. For more information: www.SHOOKresearch.com. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Raymond James is not affiliated with Forbes or Shook Research, LLC.

The Forbes ranking of Best-In-State Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative criteria and quantitative data. Those advisors who are considered have a minimum of seven years of experience, and the algorithm weighs factors like revenue trends, AUM, compliance records, industry experience and those who encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Out of approximately 32,000 advisors nominated by their firms, 4,000 received the award. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of an individual client's experience. Neither Raymond James nor any of its financial advisors or RIA firms pay a fee in exchange for this award/rating. Raymond James is not affiliated with Forbes or Shook Research, LLC.

About Raymond James & Associates

Raymond James Financial, Inc. (NYSE: RJF) is a leading diversified financial services company providing private client group, capital markets, asset management, banking and other services to individuals, corporations and municipalities. The company has approximately 8,100 financial advisors throughout the United States, Canada and overseas. Total client assets are $896 billion*. Public since 1983, the firm is listed on the New York Stock Exchange under the symbol RJF. Additional information is available at raymondjames.com.

*As of 12/31/2019. Past performance is not an indication of future results. The information provided is for informational purposes only and is not a solicitation to buy or sell Raymond James Financial stock.