

# AWARDS & RECOGNITION

## TOP AWARDS



- Titled as Rising Star of the Year 2022



- FA Magazine Fastest Growing Firm Award
- Consecutive wins from 2016-2023



- Fastest Growing Company - Featured Story 2022



- RIA of the Year Finalist: 2022
- Advisor of The Year Finalist: 2023
- Rising Star of the Year: 2023



- 2023 Luminaries Finalist: Executive Leadership - Individuals



- Fastest Growing RIA 2021



- Leader of Influence in 2022



- Top Place to Work 2018



- Top Entrepreneur for Growth 2018 & 2022



- Top 50 Advisors to Watch in 2022
- 50 Next Gen Advisors To Watch in 2023
- 200 Fast Growing Advisors To Watch in 2023
- 100 RIAs To Watch in 2023



- Investopedia 100: The Most Influential Financial Advisors for 2023



- Best Financial Advisors in Ontario 2022



- 11 Best Financial Advisors & Wealth Management Firms 2022-2023

## PODCASTS

- More Knowledge, More Wealth with Gabriel
- Shahin Kitces Podcast Episode 160 - 01/21/20
- Balance Advisors with Travis Perry Ep 41 - 06/23/2022
- Financial Advisor Workshop #8 - 04/22/2022
- Virtual US Financial Advisors Podcast
- Health and Wealth Podcast Ep 72 - 10/05/22
- New Planner Recruiting Podcast - Ep 147: With Nicky Amore CFP®

## ASSOCIATIONS

- Fiona Ma- Financial Freedom and Economic Stability
- NAPFA
- Fee-Only Network
- Smart Asset
- Inland Empire Chamber of Commerce
- National Ethics Association
- FPA
- FCE

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Thank you to all clients and team members.



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## PUBLICATIONS

- ✓ Forbes - 05/09/2022 **Forbes**
- ✓ Barrons - 09/01/2019 and 09/16/2021 **BARRON'S**
- ✓ Entrepreneur - 01/21/2022 **Entrepreneur**
- ✓ ASU Alumni Association - 04/25/2018 **ASU**
- ✓ FA Magazine - 07/07/2017 **FA**
- ✓ Financial Advisor IQ - 07/11/2017 **FINANCIAL ADVISOR IQ**
- ✓ Vanguard Active Bonds Commentary - 2021 **Vanguard**
- ✓ ED Times - 11/13/2020 **ED Times | Youth Blog**
- ✓ Ignite Success with Wendy Barlin 09/02/2022 **WENDY BARLIN**
- ✓ US News 08/02/23 **U.S. News**
- ✓ WAND 17 NEWS 11/15/23 **WAND 17**

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