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Barron's 2024 Top 100 RIA Firms List

For more information about the Barron's 2024 Top 100 RIA Firms List, please visit [Barron's website](#).

Barron's is a weekly magazine/newspaper published by Dow Jones & Company that conducted the survey. Advisory firms who wish to be ranked fill out a question survey about their practice. Barron's ninth annual ranking of independent advisory companies is based on assets managed by the firms, growth, technology spending, succession planning, and other metrics. For the first time, Barron's is ranking the largest registered investment advisor firms separately from its broader RIA ranking. For the list of mega RIAs, Barron's selected firms that manage 2% or more of the total assets of all ranking applicants. This year, the threshold was \$70 billion in assets. Ranking awarded in September 2024 based on data within a 12-month period. Linscomb Wealth is not aware of any undisclosed facts that would call into question the validity or appropriateness of the rating. Licensing fees paid post award for use of the ranking and Barron's logo.

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Financial Advisor 2023 RIA Survey and Ranking

For more information about the Financial Advisor 2023 RIA Survey and Ranking, please visit <https://www.fa-mag.com> and [FA 2023 RIA Survey and Ranking](#).

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FA conducts two surveys annually: RIA survey and Independent Broker-Dealer survey. Advisors who qualify to participate complete and submit information voluntarily to FA's survey. For this survey, 495 firms were ranked.

FA's RIA survey is a ranking based on assets under management at year end of independent RIA firms that file their own ADV with the SEC. FA's RIA ranking orders firms from largest to smallest, based on AUM reported to us by firms. To be eligible for the ranking, firms must be independent registered investment advisors and file their own ADV statement with the SEC and provide financial planning and related services to individual clients. Firms must have at least \$500 million in assets under management as of December 31, 2022, to be included in the print edition of Financial Advisor Magazine's 2023 RIA survey.

The ranking was awarded on July 14, 2023. Licensing fees paid post award for use of the FA ranking logo in our marketing materials. The ranking covers the annual period ending December 31, 2022.

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