Advisor Hub's 1,000 Advisors to Watch (2026):

https://www.advisorhub.com/advisors-to-watch-under-1b-2026/

We're pleased to publish our fifth annual Advisors to Watch ranking. It's been gratifying to see the list's popularity grow year after year – particularly with independent advisors. This is validation of our original goal to identify high-quality advisors from across the country who are growing their businesses and delivering exceptional service to clients. To do this, we collect data from teams in three major categories:

- Scale of the business, including assets under management, profitability, average account size, and the ratio of team members to client households.
- Growth of the business, as measured by year-over-year increases in client households, assets, and profits.
- Professionalism, which evaluates an advisor's regulatory record, certifications, years of service, and community involvement.

These factors allow us to highlight a more dynamic mix of advisors—not just the largest or most established, but also those building innovative, forward-thinking practices. We also ask nominees to share something beyond the numbers about themselves or their teams.

InvestmentNews RIA Team of the Year (Under 10 Advisors):

https://investmentnewsawards.com/2026-winners-excellence-awardees#riaunder10

This award recognizes the most outstanding advisory team or office with fewer than 10 staff (including full-time equivalents, advisors and support staff) that has displayed excellence over the past 12 months.

Advisory teams or offices may nominate themselves and the IN team will also consider input from peers, partners, and clients.

When judging this category, the following criteria will be considered:

- Employee value proposition (business development support, marketing support, education, training, philanthropy)
- Overall client service and relationship management
- Unique business plan and strategies to interact with new and existing clients
- Spirit of innovation with use of wealth technology and digital platforms/tools
- Industry reputation

Advisor Hub's 200 Women Advisors to Watch (2026):

https://www.advisorhub.com/women-advisors-to-watch-2026/

Advisor Hub created a list of 200 women advisors and their teams with sophisticated practices, strong growth, and a commitment to professionalism. These advisors represent efficient, productive teams that have achieved scale without compromising their level of service, while continuing to maintain healthy growth.

Advisor Hub's 1,000 Advisors to Watch (2025):

https://www.advisorhub.com/resources/rankings/

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Forbes | SHOOK Research's 2025 "Best-In-State Top Next-Gen Wealth Advisors" (2025):

https://www.forbes.com/lists/best-in-state-next-gen-advisors/

The Forbes Next-Gen Wealth Advisors rankings, developed by SHOOK Research, is based on an algorithm of qualitative criteria—mostly gained through telephone, virtual, 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 receives a fee in exchange for rankings. The awards listed do not require membership or payment for consideration.

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Forbes | SHOOK Research's 2025 "Best-In-State Top Next-Gen Wealth Advisors" (2025):

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