

TOTAL ASSETS UNDER MANAGEMENT
\$3,350,000,000+

PRACTICES OF LEVEL FOUR

5

Financial Planning
Asset Management
Risk Management
Business Services
Retirement Plans



- 9TH LARGEST** Wealth Management firm by AUM according to **ACCOUNTING TODAY'S 2018²** Top 150 CPA firms
- TOP 300 RIA** in the country by the **FINANCIAL TIMES 2018³**
- TOP RETIREMENT PLAN** Advisory firm by **PLANADVISER 2017⁴**
- NAPA TOP DC ADVISOR FIRM 2017⁵**

Investment advice offered through Level Four® Advisory Services, LLC

All data current as of July 11, 2018.

¹ Based on growth of Assets Under Management since 2014

² Data provided by Audit Analytics, a premium online intelligence service that delivers audit, regulator and disclosure analysis to the accounting community www.auditanalytics.com.

Source: <https://www.accountingtoday.com/2018-wealth-magnets-the-top-150-cpa-firms-by-aum>

³ Areas of consideration include adviser AUM, asset growth, the company's age, industry certifications of key employees, SEC compliance record and online accessibility.

Source: <https://www.ft.com/content/a31e1e08-4d54-11e8-97e4-13afc22d86d4>

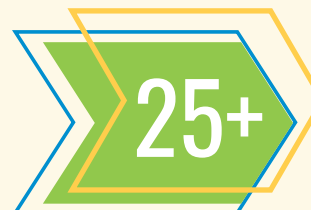
⁴ Large teams needed \$3.5 billion or more in retirement plan AUA or at 150 or more plans.

Source: <https://www.planadviser.com/awards/top-100/#/Introduction-and-Methodology>

⁵ Top Defined Contribution Advisor Teams with AUA Under \$100 Million.

Source: <https://www.napa-net.org/industry-lists/top-dc-advisor-teams-over/>

⁶ Designations represent those approved and held by advisors across the organization current as of July 11, 2018.



DIFFERENT PROFESSIONAL DESIGNATIONS⁶

AAMS®	CFP®	CRPC®
ADPA®	ChFC®	CRPS®
AIF®	ChFECSM	E.A.
AIFA®	CIMA®	LUTCF®
APMA®	CLTC®	PFS™
CASL®	CLU®	RFC®
CDFATM	CMFC®	RICP®
CEPA®	CPA	
CFA®	CPWA®	