



# Recognized as a leader in the industry

## FTB Financial Services



"We believe our industry accolades speak to the trust and deep relationships we have built over our 30+ years. It is an honor to be recognized among the best in Ohio and as one of the top 100 teams in the country and a top 3 team in Ohio."

**Bill McCarthy, CFP®**

Senior Vice President–Wealth Management  
FTB Financial Services

### **Forbes**

- Top Wealth Management Teams, High Net Worth, 2022  
The *Forbes* rating is compiled by SHOOK Research and awarded annually in November based on information from a 12-month period ending in March of the award year.
- Best-In-State Wealth Management Teams, Ohio, 2023  
The *Forbes* rating is compiled by SHOOK Research and awarded annually in January, based on information from a 12-month period ending March of the prior year.
- Best-In-State Wealth Advisors, Ohio  
The *Forbes* rating is compiled by SHOOK Research and awarded annually in April based on information from a 12-month period ending June of the prior year.

**Robert Bult, CFP®, 2019 – 2023**

**Timothy Dumont, CFA, 2020 – 2023**

**Daniel Torbeck, CFA, 2018 – 2020**

**Scott Cengia, CFP®, 2021 – 2023**

**Bill McCarthy, CFP®, 2022, 2023**

**Kelly Wittich, CFP®, 2020 – 2023**

- Top Women Wealth Advisors  
The *Forbes* rating is compiled by SHOOK Research and awarded annually in February based on information from a 12-month period ending September of the prior year.

**Kelly Wittich, CFP®, 2020 – 2023**

### **Barron's**

- Top 1,200 Financial Advisors  
The *Barron's* rating is awarded annually in March and is based on information from the prior year Q3.

**Robert Bult, CFP®, 2021 – 2023**

**Daniel Torbeck, CFA, 2012 – 2015, 2017 – 2020**

Eligibility is based on quantitative factors and is not necessarily related to the quality of the investment advice. The advisor paid a fee to display the rating logo in connection with the award.



### **FTB Financial Services**

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