

Exceptional guidance

Prestigious recognition in wealth management

Congratulations to Mike Lappin, Managing Director at Raleigh PWM, on being named a Barron's Top 1,200 Financial Advisor, ranked #6 in North Carolina and #1 in Raleigh. He was also named a Forbes Best-In-State Wealth Advisor for 2023, ranked #4 in North Carolina and #1 in Raleigh.

The *Barron's* rating is awarded annually in March based on information from the prior year Q3. Eligibility is based on quantitative factors and is not necessarily related to the quality of the investment advice.

The *Forbes* ratings are compiled by SHOOK Research and awarded annually in April based on information from a 12-month period ending June of the prior year. Eligibility is based on quantitative factors and is not necessarily related to the quality of the investment advice.

This recognition is a testament to Mike's hard work and dedication to building collaborative, trusted relationships and providing personalized advice to each client.

Mike Lappin

Managing Director–Private Wealth Management

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Congratulations to Bill Smith, Managing Director at Raleigh PWM, on being named a Barron's Top 1,200 Financial Advisor, ranked #20 in North Carolina and #6 in Raleigh. He was also named a Forbes Best-In-State Wealth Advisor for 2023, ranked #8 in North Carolina and #4 in Raleigh.

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The *Forbes* ratings are compiled by SHOOK Research and awarded annually in April based on information from a 12-month period ending June of the prior year. Eligibility is based on quantitative factors and is not necessarily related to the quality of the investment advice.

This recognition is a testament to Bill's hard work and dedication to building collaborative, trusted relationships and providing personalized advice to each client.

Bill Smith

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