Recognized as a leader in the industry

FTB Financial Services

The advisor paid a fee to display the rating logo in connection with the award.

"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

– America's Top 100 High Net Worth Teams, 2022, 2023
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, 2024
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 – 2024
Daniel Torbeck, CFA, 2018 – 2020
Scott Cengia, CFP®, 2021 – 2024
Bill McCarthy, CFP®, 2022, 2024
Kelly Wittich, CFP®, 2020 – 2024

– 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 – 2024

Barron's

– Top 250 Private Wealth Management Teams, 2024
The *Barron's* rating is awarded annually in May based on information from the prior year Q4.

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

Bill McCarthy, CFP®, 2024
Timothy Dumont, CFA, 2024
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.

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