

# Our industry recognition

## The Burish Group UBS Financial Services Inc.

Established in 1991, The Burish Group has grown to a team of 50 financial professionals located in five offices in the Midwest and licensed in 48 states. Holistic wealth management is the cornerstone of The Burish Group's planning-based service: we seek to understand all your financial needs so that we can implement an appropriate investment strategy, as well as provide advice on all aspects of your financial life.

### **Forbes**

- Best-In-State Wealth Management Teams, 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.

- America's Top Wealth Management Teams High Net Worth, 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.

- America's Top Wealth Advisors in the US

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.

**Andy Burish**, 2016 – 2024

- Best-In-State Wealth Advisor in WI

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.

**Jason Maas**, 2022 – 2024

**Andy Burish**, 2018 – 2024

- Best-In-State Wealth Advisors in IL

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.

**Laurie Barry**, 2020 – 2024

**Frank Oddo**, 2020 – 2024

- America's Top Women Wealth Advisors Best-In-State

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.

**Laurie Barry**, 2020 – 2024

- America's 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.

**Laurie Barry**, 2020, 2021

Eligibility is based on quantitative factors and is not necessarily related to the quality of the investment advice.

## **Barrons**

- Barron's Top 100 Private Wealth Management Teams, 2021 – 2023  
The Barron's rating is awarded annually in April based on information from the prior year Q4.
- 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.
- Barron's Hall of Fame  
The Barron's rating is awarded annually in October based on Barron's ratings received over the prior 10 years.

### **Andy Burish, 2019**

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

### **Andy Burish, 2014 – 2020, 2022 – 2024**

### **Jason Maas, 2023 – 2024**

- Top 100 Financial Advisors  
The Barron's rating is awarded annually in April based on information from the prior year Q4.

### **Andy Burish, 2012 – 2021**

## **Working Mother**

- Working Mother Magazine/SHOOK Top Wealth Advisor Moms  
The Working Mother magazine/SHOOK rating is compiled by SHOOK Research and awarded annually in October based on information from a 12-month period ending in March of the award year.

### **Laurie Barry, 2018 – 2022**

Eligibility is based on quantitative factors and is not necessarily related to the quality of the investment advice.



## **Wisconsin**

### **Brookfield**

17335 Golf Parkway, Suite 525  
Brookfield, WI 53045  
262-794-0872

### **Madison**

8020 Excelsior Drive, Suite 400  
Madison, WI 53717  
608-831-4282

## **Illinois**

### **Barrington**

303 East Main Street, Suite 300  
Barrington, IL 60010  
847-277-2123

### **Chicago**

One North Wacker Drive, Suite 3200  
Chicago, IL 60606  
312-525-4393

### **Northbrook**

Five Revere Drive, Suite 500  
Northbrook, IL 60062  
312-525-4529

Over \$5.5 billion in local assets under management.\*

[advisors.ubs.com/burishgroup](http://advisors.ubs.com/burishgroup)

\*As of July 31, 2024.

For more information on third-party rating methodologies, please visit [ubs.com/us/en/designation-disclosures](http://ubs.com/us/en/designation-disclosures).

As a firm providing wealth management services to clients, UBS Financial Services Inc. offers investment advisory services in its capacity as an SEC-registered investment adviser and brokerage services in its capacity as an SEC-registered broker-dealer. Investment advisory services and brokerage services are separate and distinct, differ in material ways and are governed by different laws and separate arrangements. It is important that you understand the ways in which we conduct business, and that you carefully read the agreements and disclosures that we provide to you about the products or services we offer. For more information, please review the client relationship summary provided at [ubs.com/relationshipsummary](http://ubs.com/relationshipsummary), or ask your UBS Financial Advisor for a copy. © UBS 2024. All rights reserved. The key symbol and UBS are among the registered and unregistered trademarks of UBS. UBS Financial Services Inc. is a subsidiary of UBS Group AG. Member FINRA/SIPC. VIP\_10292024-3 IS2207267 Exp.: 02/28/2025