

Our industry recognition

Highbridge Wealth Management
UBS Financial Services Inc.

Forbes

- *Forbes* Best-In-State Wealth Management Teams, 2023 – 2025

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.

- *Forbes* Best-In-State Wealth Advisors

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.

Mark Kever, 2019 – 2023

Shawn Nicholas, 2021 – 2025

Megan Portacci, 2025

- *Forbes* America's Top Next-Gen (Generation) Wealth Advisors

The *Forbes* rating is compiled by SHOOK Research and awarded annually in August based on information from a 12-month period ending in March of the award year.

Megan Portacci, 2024

- *Forbes* Top Next-Gen (Generation) Wealth Advisors Best-In-State

The *Forbes* rating is compiled by SHOOK Research and awarded annually in August based on information from a 12-month period ending in March of the award year.

Megan Portacci, 2024

- *Forbes* 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.

Megan Portacci, 2025

Barron's

- *Barron's* Top 1,000 Financial Advisors

The *Barron's* rating is awarded annually in March and is based on information from the prior year Q3.

Mark Kever, 2010, 2011

- *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.

Mark Kever, 2014, 2016 – 2019

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

Highbridge Wealth Management

UBS Financial Services Inc.

7250 Dallas Parkway
Suite 1200
Plano, TX 75024

advisors.ubs.com/highbridge

For more information on third-party rating methodologies, please visit ubs.com/us/en/designation-disclosures.

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