UBS

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

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

Bill McCarthy, CFP®
Financial Advisor
Senior Vice President–Wealth Management
FTB Financial Services

Forbes

- America's Top Wealth Management Teams High Net Worth, 2022 – 2024
  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 – 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.
- 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 – 2025
  Scott Cengia, CFP®, 2021 – 2025
  Bill McCarthy, CFP®, 2020 – 2025
  Kelly Wittich, CFP®, 2020 – 2025

- 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 – 2025

Barron's

- Top 250 Private Wealth Management Teams, 2024 and 2025
  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 – 2025
  Timothy Dumont, CFA, 2024 – 2025
  Robert Bult, CFP®, 2021 – 2023

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

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