

Recognized as a leader in the industry

FTB Financial Services



"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."

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

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

Forbes

- America's Top Wealth Management Teams High Net Worth, 2022 – 2025
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 – 2026
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.

Timothy Dumont, CFA, 2020 – 2026
Scott Cengia, CFP®, 2021 – 2026
Bill McCarthy, CFP®, 2020 – 2026
Kelly Wittich, CFP®, 2020 – 2026

- 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 – 2026

Barron's

- Top 250 Private Wealth Management Teams, 2024 – 2026
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 – 2026
Timothy Dumont, CFA, 2024 – 2026

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



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

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