



Research that Recognizes Outstanding Service Professionals

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## 2012 Wealth Managers Research Overview

### 2012 Five Star Wealth Manager Program

The Five Star program, now entering its seventh year, is the largest and most widely published wealth manager award program in North America. As part of the updated research process for the 2012 Five Star Wealth Manager program, firms and peers nominate award candidates. Award candidates are evaluated against 10 objective criteria to determine the 2012 Five Star Wealth Managers in more than 40 major markets. The updated Five Star Wealth Manager award process includes:

**Nominations by peers and firms:** Wealth managers, including financial planners and advisors, CPAs and estate planning attorneys, are nominated by their firm or a peer to be considered for the Five Star Wealth Manager award. Self-nominations are not accepted.

**Objective selection process:** Award candidates are evaluated against 10 objective criteria such as client retention rates, client assets administered and a favorable regulatory and complaint history. No more than 7 percent of the wealth managers in a market receive the Five Star award.

**Regulatory and consumer complaint process:** Feedback from consumer surveys will augment a regulatory history review.

**Firm review:** Firms will have the option to provide input on award candidates from their firm, regardless of the nomination source.

Click [here](#) for detailed information on the 2012 Five Star Wealth Manager research methodology.