

We are happy to share that Forbes recognized us on their list of Best-In-State 2024. We want to take a moment and to thank all my clients, colleagues, friends, and family. This recognition would not have been possible without your trust and confidence in the team. As always, your financial future remains our top priority and underlies all that the team does daily. So, on behalf Monica Woodward, Rachael Tobor, Cristina Betancourt, and Jack Woodward thank you for your ongoing support and advocacy.

Source: Forbes.com (January 2024) Forbes Best-In-State Wealth Management Teams ranking awarded in 2024. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) during the period from 3/31/22 – 3/31/23.

