

## **McAdam LLC (“McAdam”) Award Disclosures**

### **General Disclosure**

Awards, rankings, ratings, and/or recognition by unaffiliated rating services and/or publications are not indicative of McAdams’s future performance, should not be construed by a client or prospective client as a guarantee that such client will experience a certain level of results if McAdam is engaged, or continues to be engaged to provide investment advisory services, nor should they be construed as a current or past endorsement of McAdam by any of its clients.

Rankings published by magazines, and others, generally base their selections exclusively on information prepared and/or submitted by the recognized adviser. Such awards, rankings, ratings, and/or recognition are no guarantee of future investment success. Working with a highly rated advisor does not ensure that a client or prospective client will experience a higher level of performance. Generally, rankings are based on information prepared and submitted by the adviser.

The awards listed do not require membership or payment for consideration. By virtue of disclosing an award ranking, McAdam is disclosing favorable ratings (to the extent that McAdam is ranked above other advisors) and unfavorable ratings (to the extent that McAdam is ranked below other advisors). The awards and rankings are independently granted. McAdam is not affiliated with the awarding rating services or and/or publications listed.

### **Newsweek America’s Top Advisory Firms (2025)**

Awards, rankings, ratings, and/or recognition by unaffiliated rating services and/or publications are not indicative of McAdam’s future performance, should not be construed by a client or prospective client as a guarantee that such client will experience a certain level of results if McAdam is engaged, or continues to be engaged to provide investment advisory services, nor should they be construed as a current or past endorsement of McAdam by any of its clients. Rankings published by magazines, and others, generally base their selections exclusively on information prepared and/or submitted by the recognized adviser. Such awards, rankings, ratings, and/or recognition are no guarantee of future investment success. Working with a highly rated advisor does not ensure that a client or prospective client will experience a higher level of performance. Generally, rankings are based on information prepared and submitted by the adviser. The awards listed do not require membership or payment for consideration. By virtue of disclosing an award ranking, McAdam is disclosing favorable ratings (to the extent that McAdam is ranked above other advisors) and unfavorable ratings (to the extent that McAdam is ranked below other advisors). The awards and rankings are independently granted. McAdam is not affiliated with the awarding rating services or and/or publications listed. America’s Top Financial Advisory Firms award received in 2024 were granted by Newsweek, with assistance from Plant-A Insights Group. McAdam LLC did not apply for or pay for the award. The ranking of the best registered investment advisory firms is based on methodology determined by Plant-A Insights Group and Newsweek.

### **USA Today Best Financial Advisory Firms (2025)**

This award was granted by USA Today, with assistance from Statista, in 2025. McAdam LLC did not apply for or pay for the award. For the full methodology of the award, please [click here](#).

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### **Inc. 5000 Fastest Growing Companies [2017]**

Inc. magazine is a New York-based publication owned by Mansueto Ventures, Inc. Inc. Magazine produces annual rankings of the fastest growing privately held companies in the United States. The 2017 Inc. 5000 was ranked by percentage revenue growth during the period 2013 to 2016. To qualify, companies must have been founded and generating revenue by March 31, 2013. They had to be U.S.-based, privately held, for profit, and independent—not subsidiaries or divisions of other companies—as of December 31, 2016. McAdam furnished Inc. Magazine with financial information for an award evaluation, but did not make or receive any payment in association with the award. Several companies presented on this list have gone public or have been acquired. The minimum revenue required for 2013 was \$100,000; the minimum for 2016 was \$2 million. Inc. reserves the right to decline applicants for subjective reasons. Companies on the Inc. 5000 list were featured in Inc.'s September 2017 issue. They represent the top tier of the Inc. 5000, which can be found at <https://www.inc.com/inc5000/list/2017>. McAdam was ranked 4971 out of 5000 companies.

### **FA Magazine top 50 Fastest Growing RIA [2017]**

Financial Advisor Magazine's ("FA") Top 50 Fastest-Growing RIAs is an independent listing ("FA Top 50") produced annually by FA (July 2017). To be eligible for the ranking, firms must be independent registered investment advisors and file their own ADV statement with the SEC and provide financial planning and related services to individual clients. Firms must have had at least \$50 million in assets under management as of December 31, 2016. Corporate RIA firms, investment advisor representatives (IARs) and hybrids were not eligible for this survey. McAdam ranked 30 out of 50 of the Top 50 Fastest-Growing RIAs and 421 out of 638 of the overall FA RIA rankings for 2017.

FA is not affiliated with McAdam. FA's Top 50 is presented as "an elite group," not a competitive ranking of one to 50. The results are not based upon information or opinions of participating Registered Investment Advisers' ("RIA's") clients. Therefore, inclusion on the FA Top 50 is not representative of any participating RIA's clients' experiences. Neither the participating RIAs nor their employees pay a fee to FA in exchange for inclusion in FA Top 50.

The FA Top 50 is based on data gathered from RIAs, regulatory disclosures, FA's research, and/or research conducted on FA's behalf. FA indicates that the methodology used to evaluate inclusion on the FA Top 50 is quantifiable and objective, and that the participating RIAs had no subjective input in the analysis.

Approximately 700 RIAs were part of the FA's survey, of which only 50 made the FA Top 50 list. Areas of consideration include assets under management, asset growth, RIA age, and online accessibility. Assets under management and asset growth are largely determinative as to a surveyed RIA's inclusion on the FA Top 50 list. To the best of McAdam's knowledge, FA does not include RIAs on the FA Top 50 list if the ratings are not statistically valid with respect to any RIA; and there are no facts that would call into question the validity of the inclusion on the FA Top 50 or the appropriateness of McAdam advertising the same.

Inclusion on the FA Top 50 is absolutely not indicative of McAdam's future performance, or any future performance pertaining to its clients' investments; should not be construed by a client or prospective client as a guarantee that they will experience a certain level of results if McAdam is engaged, or continues to be engaged, to provide investment advisory services; and should not be construed as a current or past endorsement of McAdam by any of its clients.

More information about the FA Top 50 and McAdam's ranking may be found at : [https://www.famag.com/userfiles/2017\\_ISSUES/Financial\\_Advisor/July\\_2017/RIA\\_Survey/RIA2017\\_FastestGrowing1.pdf](https://www.famag.com/userfiles/2017_ISSUES/Financial_Advisor/July_2017/RIA_Survey/RIA2017_FastestGrowing1.pdf)

About the Financial Advisor Magazine – RIA Survey:

This annual survey is performed by Financial Advisor Magazine as a means of measuring growth among independent advisors across the U.S. Firms must be registered investment advisors and provide financial planning and/or related services to individual clients. All firms must be either independently owned or a freestanding subsidiary of another business. Data is provided by each firm, mostly from numbers and information published on their Form ADV, including assets under management. Each participating advisor is then ranked alongside their participating peers.

### **Advisory HQ Top Financial Advisors in Boston and Philadelphia - 2018**

McAdam received two related regional awards: AdvisoryHQ "Top Financial Advisors in Boston, Massachusetts" (2018); and "Top Financial Advisors in Philadelphia, Pa" (2018)

### **About AdvisoryHQ**

AdvisoryHQ News Corp is a California-based editorial, research, and ranking company that operates in the U.S., Canada, U.K., and Australia. AdvisoryHQ is owned by Market Consensus, a Nevada corporation. Each year, AdvisoryHQ conducts due diligence to identify, select, and rank companies in various industries, including financial services, wealth management, investment management, and financial advisory, amongst others. AdvisoryHQ reviews and ranking articles are independently researched and objectively written. In order to be included in any AdvisoryHQ ranking list, firms have to pass AdvisoryHQ's selective methodologies. Firms such as McAdam do not pay for their ranking.

In assessing its pool of candidates for top financial advisors, AdvisoryHQ uses a multi-step selection methodology for identifying, researching, and generating its ranking list. AdvisoryHQ's Top-Down Advisor Selection Methodology methodologies are based on a wide range of filters including: quality of services provided, overall value provided, transparency, customized services, history of innovation, customer experience (positive and negative), level of independence, team excellence, and other criteria. Below is a step-by-step overview of AdvisoryHQ's methodology process. AdvisoryHQ reviews and ranks advisory companies only; it does not rank individual financial professionals.

Step 1: Using publicly available sources, AdvisoryHQ identifies a wide range of firms that are providing services in a designated area (city, state, or local geographic location).

Step 2: AdvisoryHQ's review team then applies initial methodology filters to narrow down the list of identified firms/products. These filters include company strengths, trustworthiness, transparency, professional reputation, managed asset, ROI/ROA effectiveness, fees structure, what customers/clients are saying about the organization, and other criteria.

Step 3: After reducing the initial list, AdvisoryHQ then assesses the remaining firms. The award criteria take into account a range of factors, including experience level, level of customization, site quality, resources, features, range of provided services, innovation, value-added, and many more factors, to build up a broad picture of what each firm or product has to offer, before the final selection process occurs.

Step 4: Based on the results of performed assessment, AdvisoryHQ's research and selection team then finalizes the list of entities that make it into its top rated publications, which are then published to the general public.

Candidates are ranked on a scale from one (1) to five (5). Recipients are then listed with their corresponding rating and highlighted features. McAdam LLC received a ranking of 5 in each geographic category.

With respect to AdvisoryHQ's "Top Financial Advisors in Boston, Massachusetts," McAdam LLC received the ranking in 2018. In 2018, 10 Financial Advisors received recognition on the ranking.

With respect to AdvisoryHQ's "Top Financial Advisors in Philadelphia, Pennsylvania," McAdam LLC received the ranking in 2018. In 2018, 8 Financial Advisors received recognition for the ranking.

With respect to AdvisoryHQ's "Top Financial Advisors in Boston, Massachusetts," McAdam LLC received the ranking in 2019. In 2019, 10 Financial Advisors received recognition on the ranking.

With respect to AdvisoryHQ's "Top Financial Advisors in Philadelphia, Pennsylvania," McAdam LLC received the ranking in 2019. In 2019, 9 Financial Advisors received recognition for the ranking.

AdvisoryHQ does not require membership or payment in order for award participants and/or applicants to be considered for an award designation. McAdam LLC did not pay a fee to be considered for the award designation. By virtue of disclosing this ranking, McAdam LLC is disclosing favorable ratings (to the extent that McAdam LLC is ranked above other advisors) and unfavorable ratings (to the extent that McAdam LLC is ranked below other advisors).

Inclusion on the "Top Financial Advisors in Boston, Massachusetts" or "Top Financial Advisors in Philadelphia, Pennsylvania" is not indicative of McAdam LLC's future performance, or any future performance pertaining to its clients' investments; should not be construed by a client or prospective client as a guarantee that they will experience a certain level of results if McAdam LLC is engaged, or continues to be engaged to provide investment advisory services; and should not be construed as a current or past endorsement of McAdam LLC by any of its clients.

Additional information on AdvisoryHQ's Selection and Ranking Methodologies for its Top Financial Advisors ranking lists is available at the following links:

<https://www.advisoryhq.com/articles/advisoryhq-methodology-for-selecting-top-advisors/>;

<https://www.advisoryhq.com/about-us/>.

Additional information about AdvisoryHQ's "Top Financial Advisors in Boston, Massachusetts" and the 2018 ranking is available at the following link: <https://www.advisoryhq.com/articles/top-rated-wealth-managers-in-massachusetts/>.

Additional information about AdvisoryHQ's "Top Financial Advisors in Philadelphia, Pennsylvania" and the 2018 ranking is available at the following link: <https://www.advisoryhq.com/articles/top-financial-advisors-in-philadelphia-pa/>.

Additional information about AdvisoryHQ's "Top Financial Advisors in Boston, Massachusetts" and the 2019 ranking is available at the following link: <https://www.advisoryhq.com/articles/top-rated-wealth-managers-in-massachusetts/>

Additional information about AdvisoryHQ's "Top Financial Advisors in Philadelphia, Pennsylvania" and the 2019 ranking is available at the following link: <https://www.advisoryhq.com/articles/top-financial-advisors-in-philadelphia-pa/>

### **Stevie Award -Employer of the Year [2018]**

McAdam was recognized by the Stevie® Awards for Great Employers with an "Employer of the Year" 2018 award in the Financial Services category.

The Stevie Awards are conferred in eight programs: The Middle East Stevie Awards, the Asia-Pacific Stevie Awards, the German Stevie Awards, The American Business Awards®, The International Business Awards®, the Stevie Awards for Great Employers, the Stevie Awards for Women in Business, and the Stevie Awards for Sales & Customer Service. Stevie Awards competitions receive more than 10,000 entries each year from organizations in more than 70 nations. Honoring organizations of all types and sizes and the people behind them, the Stevies recognize outstanding performances in the workplace worldwide. More information on the Stevie Awards is available at <http://www.StevieAwards.com>.

The selection of "Employer of the Year" for a Stevie Award is based upon a combination of feedback received from employees, members of the general public and various industry experts who participate in the selection process. Candidates for the award submit an essay summarizing why the organization is considered a desirable work environment. Candidates may also deliver various documents for evaluation by the industry expert judges. McAdam submitted its own essay discussing firm culture and various programs designed to enhance employee satisfaction and retention rates.

### **SmartCEO Corporate Culture Award- Philadelphia (2017)**

The Corporate Culture Awards is awarded to twenty-five of Philadelphia's companies who foster a creative, collaborative and successful workplace culture. Each year, an independent committee of local business leaders selects winners based on the quality of applications submitted. McAdam did not pay for this award and no portion of the evaluation criteria considered the RIA client experience.

SmartCEO's mission is to educate and inspire the business community through its award-winning magazine, connections at C-level events and access to valuable online resources. SmartCEO's integrated media platforms reach decision makers in the Baltimore, New York, Philadelphia and Washington, metropolitan areas.

SmartCEO distributes awards annually based on company submissions to be considered for such awards. SmartCEO is not affiliated with McAdam, LLC. The SmartCEO Corporate Culture Award is not based upon information or opinions of participating Registered Investment Advisers' ("RIA's") clients. Therefore, this

award is not representative of any participating RIA's clients' experiences. Neither McAdam, LLC nor their employees paid a fee in exchange for inclusion in the SmartCEO list.

The SmartCEO Corporate Culture Award is not indicative of McAdam's future performance, or any future performance pertaining to its clients' investments; should not be construed by a client or prospective client as a guarantee that they will experience a certain level of results if McAdam is engaged, or continues to be engaged, to provide investment advisory services; and should not be construed as a current or past endorsement of McAdam by any of its clients.