

McAdam LLC — Awards & Rankings Disclosure

General Disclosure (Applies to All Awards and Rankings)

McAdam LLC (“McAdam”) has received various awards, rankings, ratings, and/or recognition from unaffiliated third-party rating services, publications, and media organizations. These recognitions are not indicative of McAdam’s future performance, do not guarantee any specific level of investment results, and should not be construed as an endorsement by any current or past client.

Awards and rankings are generally based on criteria and methodologies determined by the awarding organization, which may include information submitted by the advisor and/or publicly available data. Rankings and recognitions do not reflect the performance of client accounts, and working with a highly rated advisor does not ensure superior investment outcomes.

Unless otherwise stated, McAdam did not apply for or pay a fee to be considered for these awards. By referencing these recognitions, McAdam is disclosing both favorable and unfavorable ratings relative to other advisors included in the applicable rankings. McAdam is not affiliated with any awarding organization. A licensing fee is required for the use of each award logo.

Additional information regarding the criteria and methodologies used for any referenced ranking is available from the awarding organization upon request. McAdam’s Chief Compliance Officer is available to address questions regarding these awards and recognitions.

National Awards & Rankings

Newsweek – America’s Top Financial Advisory Firms (2024, 2025, 2026)

Awarded by Newsweek, with research and methodology provided by Plant-A Insights Group.

McAdam did not apply for or pay for consideration. Rankings are based on criteria developed by Newsweek and Plant-A Insights Group, including firm growth, client assets, and other quantitative and qualitative factors as determined by the ranking sponsor.

USA Today – Best Financial Advisory Firms (2023, 2024, 2025, 2026)

Awarded by USA Today, with assistance from Statista.

McAdam did not apply for or pay for consideration. Rankings are based on Statista’s methodology, which may include advisor surveys, asset data, and peer recommendations. Full methodology is available from USA Today/Statista.

Inc. 5000 – Fastest-Growing Private Companies (2017)

Awarded by Inc. Magazine.

The Inc. 5000 ranking is based on percentage revenue growth over a three-year period (2013–2016 for the 2017 ranking). McAdam submitted financial information for evaluation but did not pay a fee. McAdam ranked **4,971 out of 5,000** qualifying companies.

Industry-Specific Recognitions

Financial Advisor Magazine – Top 50 Fastest-Growing RIAs (2017)

Awarded by Financial Advisor Magazine.

Eligibility required independent SEC-registered RIAs meeting specific asset and growth thresholds. Rankings were based on objective data including assets under management and growth rates.

McAdam ranked **30 of 50** qualifying firms. Participation did not require payment, and rankings were not based on client surveys or testimonials.

Regional Advisory Firm Rankings

AdvisoryHQ – Top Financial Advisors (Boston & Philadelphia) (2018–2019)

Awarded by AdvisoryHQ.

AdvisoryHQ uses a multi-step evaluation process incorporating qualitative and quantitative criteria such as firm services, transparency, innovation, and overall value.

McAdam received a **5-rating designation** in each applicable geographic category. No fee was paid for consideration.

Employer & Corporate Culture Awards

(These awards recognize workplace culture and employment practices and are not related to investment advisory services or client outcomes.)

Stevie® Awards – Employer of the Year (2018)

Awarded by the Stevie Awards for Great Employers.

Selection was based on submitted materials, employee feedback, and independent judging panels. This award does not evaluate investment performance or client experience.

SmartCEO – Corporate Culture Award (Philadelphia) (2017)

Awarded by SmartCEO.

Recognition was based on company-submitted applications and evaluation by an independent committee. This award does not reflect client experience, investment results, or advisory performance.

Important Limitations

No ranking or recognition should be construed as a guarantee of future results, a measure of investment performance, or an endorsement by any current or former client. Awards are based on specific methodologies that may change over time, and inclusion in any ranking does not imply that all advisors or firms were evaluated.

Questions regarding awards, rankings, or related disclosures may be directed to McAdam LLC's Chief Compliance Officer.