2024 AWARD WINNER CONGRATULATIONS!

Hello,

We are pleased to announce that Suzette Porter has won the 2024 Five Star Wealth Manager award! By earning this honor, Suzette Porter has demonstrated a commitment to clients. Please offer Suzette Porter your congratulations.

Five Star Professional has recognized in the pages of Texas Monthly an outstanding group of Austin, San Antonio and Central Texas-area investment professionals. Five Star Wealth Managers are named using an in-depth research methodology that includes ten objective criteria.

Congratulations once again to Suzette Porter and to all of our 2024 Five Star Wealth Managers!

Sincerely,

Wesser



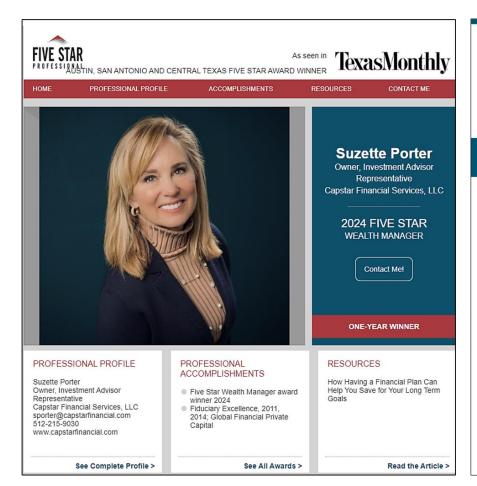
Jonathan Wesser | VP, Operations Five Star Professional www.fivestarprofessional.com

> Suzette Porter Owner, Investment Advisor Representative

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This award was issued on 07/01/2024 by Five Star Professional (FSP) for the time period 10/10/2023 through 04/30/2024. Fee paid for use of marketing materials. Self-completed questionnaire was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria. 1,400 Austin, San Antonio and Central Texas-region wealth managers were considered for the award; 90 (6% of candidates) were named 2024 Five Star Wealth Managers. The following prior year statistics use this format: YEAR: # Considered, # Winners, % of candidates, Issued Date, Research Period. 2023: 1,251, 79, 6%, 7/1/23, 11/14/22 - 5/5/23; 2022: 1,304, 90, 7%, 7/1/22, 9/20/21 - 4/8/22; 2021: 1,233, 118, 10%, 7/1/21, 9/14/20 - 4/30/21; 2020: 1,254, 124, 10%, 7/1/10, 9/30/19 - 4/17/20; 2019: 1204, 178, 15%, 7/1/19, 10/15/18 - 4/26/19; 2018: 1,102, 161, 15%, 7/1/18, 10/30/17 - 5/21/18; 2017: 1,431, 207, 14%, 7/1/17, 10/27/16 - 5/23/17; 2016: 1,283, 351, 27%, 6/1/16, 12/8/15 - 5/20/16; 2015: 1,968, 374, 19%, 7/1/15, 9/30/14 - 5/15/15; 2014: 2,794, 357, 13%, 7/1/14, 9/30/13 - 5/15/14; 2013: 2,254, 399, 18%, 8/1/2-13, 5/13/13 - 7/1/13; 2012: 1,673, 392, 23%, 7/1/12, 9/30/11 - 5/15/12.

Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. The award is based on 10 objective criteria. Eligibility criteria – required: 1. Credentialed as a registered investment adviser (RIA) or as a principal of a registered investment adviser representative; 2. Actively licensed as a RIA or as a principal of a registered investment adviser for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by FSP, the wealth manager has not, A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; 8. Had more than a total of three settled or pending complaints them and/or a total of five settled, pending, dismissed or leveldack may note be representative of any one clients? Exponence; C. Individually contributed to a financial settlement of a customer complaint; D. Filed for personal bankruptcy within the past 11 years; E. Been terminated from a financial services firm within the past 11 years; F. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients, Evaluation criteria – considered; 6. One-year client teetnion rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations, FSP does not evaluate quality of services provided to clients. The award is not indicative of the wealth manager's future performance. Wealth manager may or use discretion in their practice and therefore may not manager that seitered investment adviser (in the settled with a regulatory authod to be constituted as an endorsement of the wealth managers of the wealth managers may or may or use discretion in their practice and therefore may not manager that relevance is a settled or provided to clients. The award is not indicative of the wealth managers for the spublication. Working with a Five Star Wealth Manager or any wealth managers will





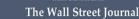
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WEALTH MANAGERS YOU NEED TO KNOW

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FIVE STAR AWARD WINNERS -YOU NEED TO KNOW-



You work hard and want your money to work hard for you with solid investments and financial strategies that fit your family and your situation. These days, finding the right professional is an integral part of one's financial freedom and well-being. But where should you turn to find transfer for the strategies of the strategies for th

The darbot who can auth rowning to your File Star Professional employed a rigorous research process to identify winners in the Austin, San Antonio and Central Texas area. Award-winning professionals were carefully selected from among thousands of wealth managers for their knowledge, service and experience.

featured here represent some of Austin, San Antonio and Central most dedicated professionals, each committed to pursuing onal excellence and providing exceptional service to their clients.

rotessional identified award candidates based on industry data attaions received from industry times and individuals in Austin, ioi and Central Texas (self-nominations are not accepted). Only s who satisfied 10 objective eligibility and evaluation criteria in amed Five Star Wealth Managers and Five Star Investment als. The full lists of Austin, San Antonio and Central Texas Five In Managers and Five Star Investment Professionals can be ne at fivestarprofessional.com. For an overview of the research



Meet these Austin, San Antonio and Central Texas award winners

About Our Research

You work hard and want your money to work hard for you! You're likely seeking solid investments and financial strategies that fit your family and your situation. These days, finding the right wealth manager is an integral part of securing your financial freedom and well-being. But where should you turn to find the adviser who can start working for you?

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Five Star Professional employed a rigorous research process to identify the Five Star award winners in cities across the United States. Award-winning professionals were carfelily selected from among thousands of wealth managers for their knowledge, service and experience (see list and disclosure for full rist of cities covered).

Winners featured here represent some of the country's most dedicated wealth managers and investment professionals, each committed to pursuing professional excellence and providing exceptional service to their clients.

Five Star Professional identified award candidates based on industry data and nominations received from industry firms and individuals (self-nominations are not accepted).

For the full list of Five Star award winners and an overview of the research methodology, visit fivestarprofessional.com

RESEARCH DISCLOSURES

FIVE STAR

In order to consider a banad population of high-quality wealth managers and investment professionals, award candidates are identified by one of three sources. Em nomination, pere commandion or propulatification based on industry stanting. Self-nominations are not accepted. Award candidates usere identified using internal and external research dut. Candidates do not pay a fee to be considered or subsets on the than its of Fine-Star Weaht Managers or Fine-Star Internet Professionals. ree to use considered any places on one more noise or mere any resum managings or mere said interaction metagona. Although this list is a useful tool for anyone looking for help in managing their financial world or implementing new aspects into the financial strategies, althould not be considered enhaustive. Undoubledly, there are many excellent professionals who, for one reason or another, are not on this year's lists.

- The Five Star awards are not indicative of a professional's future perform
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- The inclusion of a professional on the Five Star Wealth Manager list or the Five Star Investment Professional list should not be
 construct as an endorsement of the professional by Five Star Professional or Fortune. Working with a Five Star Wealth Marager, Five Star Investment Professional or any professional is no guarantee as to investment success, nor is there any guarantee that the selected professionals will be awarded this accomplishment
- Professional in the future. Five Star Professional is not an advisory firm, and the content of this article should not be considered financial advice. For more
 information on the Five Star Wealth Manager or Five Star Investment Professional award programs, research and selection criteria go to fivestarprofessional.com/research.

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FIVE STAR WEALTH MANAGER CRITERIA

Award candidates who satisfied 10 objective eligibility and evaluation criteria wave named 2024 Five Star Wealth