

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,



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%, 7/1/20, 9/30/19 - 4/17/20; 2019: 1,204, 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 a registered investment adviser representative; 2. Actively licensed as a RIA or as a principal of a registered investment adviser firm 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; B. Had more than a total of three settled or pending complaints filed against them and/or a total of five settled, pending, dismissed or denied complaints with any regulatory authority or FSP's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through FSP's consumer complaint process; feedback may not be representative of any one client's experience; 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 retention rate; 7. Five-year client retention 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 managers may or may not use discretion in their practice and therefore may not manage their clients' assets. The inclusion of a wealth manager on the Five Star Wealth Manager list should not be construed as an endorsement of the wealth manager by FSP or this publication. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by FSP in the future. Visit www.fivestarprofessional.com.



As seen in **TexasMonthly**

AUSTIN, SAN ANTONIO AND CENTRAL TEXAS FIVE STAR AWARD WINNER

HOME
PROFESSIONAL PROFILE
ACCOMPLISHMENTS
RESOURCES
CONTACT ME



Suzette Porter
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2024 FIVE STAR WEALTH MANAGER

Contact Me!

ONE-YEAR WINNER

PROFESSIONAL PROFILE

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[See Complete Profile >](#)

PROFESSIONAL ACCOMPLISHMENTS

- Five Star Wealth Manager award winner 2024
- Fiduciary Excellence, 2011, 2014, Global Financial Private Capital

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RESOURCES

How Having a Financial Plan Can Help You Save for Your Long Term Goals

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2024



FIVE STAR WEALTH MANAGER

Suzette Porter
Owner, Investment Advisor Representative

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SPECIAL ADVERTISING SECTION

The Wall Street Journal

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 the advisor who can start working for you?

Five Star Professional employed a rigorous research process to identify the Five Star Wealth Manager and Five Star Investment Professional award 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.

Winners featured here represent some of Austin, San Antonio and Central Texas's most dedicated 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 in Austin, San Antonio and Central Texas (self-nominations are not accepted). Only candidates who satisfied 10 objective eligibility and evaluation criteria have been named Five Star Wealth Managers and Five Star Investment Professionals. The full lists of Austin, San Antonio and Central Texas Five Star Wealth Managers and Five Star Investment Professionals can be found online at fivestarprofessional.com. For an overview of the research methodology, visit fivestarprofessional.com.

About Our Research

Research Disclosures
In order to consider a broad population of high-quality wealth managers, award candidates are identified by one of three sources: firm nomination, peer nomination or prequalification based on industry standing. Self-nominations are not accepted. Austin, San Antonio and Central Texas-area award candidates were identified using internal and external research data. Candidates do not pay a fee to be considered or placed on the final lists of Five Star Wealth Managers.

- The Five Star award is not indicative of a professional's future performance.
- Wealth managers may or may not use discretion in their practice and therefore may not manage their clients' assets.
- The inclusion of a professional on the Five Star Wealth Manager list should not be construed as an endorsement of the professional by Five Star Professional or The Wall Street Journal.
- Working with a Five Star Wealth Manager or any professional is no guarantee as to future investment success, nor is there any guarantee that the selected professionals will be awarded this accomplishment by Five Star 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 award program, research and selection criteria, go to fivestarprofessional.com research.

Determination of Award Winners Criteria
Award candidates who satisfied 10 objective eligibility and evaluation criteria were named 2024 Five Star Wealth Managers. **Eligibility Criteria – Required:** 1. Credentialed as a registered investment adviser or a registered investment advisor representative; 2. Actively employed as a credentialed professional in the financial services industry for a minimum of five years; 3. Favorable regulatory and complaint history review; 4. Fulfilled their firm review based on internal firm standards; 5. Accepting new clients. **Evaluation Criteria – Considered:** 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations.

Regulatory Review: As defined by Five Star Professional, the wealth manager has not been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine individually contributed to a financial settlement of a customer complaint, been convicted of a felony within the past 11 years, the wealth manager has not been terminated from a wealth management or financial services firm, filed for personal bankruptcy, had more than a total of three settled or pending complaints filed against them (and no more than five total pending, dismissed or denied with any regulatory authority).

Five Star Professional conducts a regulatory review of each nominated wealth manager using the Investment Adviser Public Disclosure (IAPD) website. Five Star Professional also uses multiple supporting processes to help ensure that a favorable regulatory and complaint history exists. Data submitted through these processes was applied per the above criteria; each wealth manager who passes the Five Star Professional regulatory review must attest that they meet the definition of favorable regulatory history based upon the criteria listed above. Five Star Professional promotes via local advertising the opportunity for consumers to confidentially submit complaints regarding a wealth manager.



Meet these Austin, San Antonio and Central Texas award winners

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FORTUNE



FIVE STAR WEALTH MANAGERS

YOU NEED TO KNOW

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 advisor who can start working for you?

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 carefully selected from among thousands of wealth managers for their knowledge, service and experience (see list and disclosure for full list 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

FIVE STAR WEALTH MANAGER CRITERIA

Award candidates who satisfied 10 objective eligibility and evaluation criteria were named 2024 Five Star Wealth Managers.

Eligibility Criteria – Required:

1. Credentialed as a registered investment adviser or a registered investment advisor representative;
2. Actively employed as a credentialed professional in the financial services industry for a minimum of five years;
3. Favorable regulatory and complaint history review;
4. Fulfilled their firm review based on internal firm standards;
5. Accepting new clients.

Evaluation Criteria – Considered:

6. One-year client retention rate;
7. Five-year client retention rate;
8. Non-institutional discretionary and/or non-discretionary client assets administered;
9. Number of client households served;
10. Education and professional designations.

Regulatory Review:
As defined by Five Star Professional, the wealth manager has not:

- Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine.
- Individually contributed to a financial settlement of a customer complaint.
- Been convicted of a felony.
- Within the past 11 years, been terminated from a wealth management or financial services firm, filed for personal bankruptcy, had more than a total of three settled or pending complaints filed against them, and no more than five total pending, dismissed, or denied with any regulatory authority.

Five Star Professional conducts a regulatory review of each nominated wealth manager using the Investment Adviser Public Disclosure (IAPD) website. Five Star Professional also uses multiple supporting processes to help ensure that a favorable regulatory and complaint history exists. Data submitted through these processes was applied per the above criteria.

- Each wealth manager who passes the Five Star Professional regulatory review must attest that they meet the definition of favorable regulatory history based upon the criteria listed above.
- Five Star Professional promotes via local advertising the opportunity for consumers to confidentially submit complaints regarding a wealth manager.

RESEARCH DISCLOSURES

In order to consider a broad population of high-quality wealth managers and investment professionals, award candidates are identified by one of three sources: firm nomination, peer nomination or prequalification based on industry standing. Self-nominations are not accepted. Award candidates were identified using internal and external research data. Candidates do not pay a fee to be considered or placed on the final lists of Five Star Wealth Managers or Five Star Investment Professionals.

Although this list is a useful tool for anyone looking for help in managing their financial world or implementing new aspects into their financial strategies, it should not be considered exhaustive. Undoubtedly, 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 performance.
- Wealth managers and investment professionals may or may not use discretion in their practice and therefore may not manage their clients' assets.
- The inclusion of a professional on the Five Star Wealth Manager list or the Five Star Investment Professional list should not be construed as an endorsement of the professional by Five Star Professional or Fortune.
- Working with a Five Star Wealth Manager, Five Star Investment Professional or any professional is no guarantee as to future investment success, nor is there any guarantee that the selected professionals will be awarded this accomplishment by Five Star 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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