

Forbes

TOP 250

WEALTH ADVISORS 2018

SHOOK RESEARCH™

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INVESTING

Randy C. Conner

Churchill Management Group

RANK	NAME	COMPANY	CITY	STATE	MINIMUM ACCOUNT SIZE FOR NEW BUSINESS	TEAM ASSETS (CUSTODIED)	TYPICAL SIZE OF HOUSEHOLD ACCOUNTS
15	RANDY C. CONNER	CHURCHILL MANAGEMENT GROUP	LOS ANGELES	CALIFORNIA	\$500K	\$5.4B	\$705K-5M

Methodology

Data provided by SHOOK™ Research, LLC. Data as of 6/30/18.

The ranking, developed by our partner Shook Research, is based on in-person and telephone due-diligence meetings and a ranking algorithm for advisors who have a minimum of seven years of experience. Criteria includes client retention, industry experience, compliance records and firm nominations as well as quantitative criteria such as assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC, which does not receive compensation from the advisors or their firms in exchange for placement on a ranking. For more information see www.SHOOKresearch.com.

1. Advisors are judged on individual contribution, but total team assets are shown; in some cases significant, noncustodied assets are not included because of verification difficulties.

2. Minimum account sizes are general, since they can vary depending on a range of circumstances.

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