

# Congratulations!

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ADVISORS

## Robert T. Edwards

Managing Director - Investments  
Senior PIM Portfolio Manager

on being named by Barron's Magazine as one of  
Florida's Top 10 Financial Advisors



Recognizing the importance of service and dedication, we proudly celebrate the accomplishment of Robert T. Edwards being named to *Barron's* Top 1,000 Advisors in the country. Celebrating 27 years of financial services in Naples, Florida and nationally.

This distinction is widely regarded as a benchmark for success, integrity and client satisfaction in the financial services industry.

The rankings are based on data provided by over 4,000 of the nation's most productive advisors. Factors included in the rankings: assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work. Institutional assets are given less weight in the scoring. Investment performance isn't an explicit component, because not all advisors have audited results and because performance figures often are influenced more by clients' risk tolerance than by an advisor's investment-picking abilities.

## **Chris LeMay, Senior Vice President, Complex Manager**

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Investment and Insurance products:

NOT FDIC-Insured	NO Bank Guarantee	MAY Lose Value
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