

FOR IMMEDIATE RELEASE

Media Contact:
Megan McWilliams, R/West
meganm@rwest.com | 503.481.5266

**FINANCIAL ADVISORS KASHA MCLEMORE, CRPC® AND MICHAEL MCCREARY, CFP®
NAMED TO 2019 FORBES' LIST OF AMERICA'S BEST-IN-STATE NEXT-GENERATION WEALTH ADVISORS**

ROCKLIN, Calif. – SEPTEMBER 10, 2019 – Raymond James Financial Services, Inc. and Addison Avenue Investment Services, the investment services division of First Tech Federal Credit Union, are pleased to announce that financial advisors Kasha McLemore and Michael McCreary were named to the 2019 Forbes list of America's [Best-in-State Next-Generation Wealth Advisors](#). The Forbes' list includes 1,484 talented advisors who represent the future of the wealth management industry.

With more than 14 years of experience, McLemore's approach to financial planning is based on long-term relationships. "When I help my clients, I know that I am not just assisting them with their current finances, I am helping them plan for a fulfilling future," she said. "This takes time, and I am fully prepared to be there for the long haul."

McCreary, who manages more than \$100 million in client assets, specializes in investment management, and rollover services for 401(k) plans. He also helps employees navigate their stock plans and strategize how to build net worthwhile minimizing taxes. "I believe my role is to provide my clients with comprehensive financial advice in all aspects of their life," said McCreary. "One of the most rewarding parts of my job is to see my clients achieve their goals."

Both advisors belong to a team of more than 30 financial advisors who possess extensive experience serving a variety of clients who work in globally-renowned hi-tech industries.

"We are incredibly proud to congratulate these extremely talented financial advisors, who belong to a group that will ultimately play a part in the future of our industry," Addison Avenue Investment Services President and Investment Executive, Scott Jenner said. "We are fortunate to have their fresh ideas and perspectives, and remain committed to helping them continue to grow and learning best practices from them."

The Forbes ranking of "America's Top Next-Generation Wealth Advisors," developed by SHOOK Research, is based on an algorithm of qualitative and quantitative data, rating thousands of advisors with a minimum of four years of experience and weighing factors like telephone and in-person interviews, client retention, industry experience, credentials, review of compliance records, and firm nominations. It also weighs quantitative criteria, such as assets under management and revenue generated for their firms. Investment performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor Shook receives a fee in exchange for rankings.*

About Addison Avenue Investment Services

Addison Avenue Investment Services was initially launched in 1998 to serve the investment needs of Hewlett-Packard employees. The team at Addison Avenue Investment Services has helped make their credit union investment program the

largest in the nation¹, with its Financial Advisors managing more than \$3.7 billion in assets for First Tech's 550,000+ members. There are 31 advisors operating in 41 First Tech branches across eight states.

Financial Advisors offer securities through **Raymond James Financial Services, Inc.** Member [FINRA](#) / [SIPC](#) and securities are not insured by credit union insurance, the NCUA or any other government agency, are not deposits or obligations of the credit union, are not guaranteed by the credit union, and are subject to risks, including the possible loss of principal. First Tech Federal Credit Union and Addison Avenue Investment Services are not registered broker/dealers and are independent of Raymond James Financial Services. Investment advisory services offered through Raymond James Financial Services Advisors.¹ Raymond James is not affiliated with Kehrer Bielan Research & Consulting. Registered address: 1011 Sunset Blvd, Rocklin, CA 95765 | 855.744.8585

About Raymond James Financial Services

Raymond James Financial Services, Inc. is a financial services firm supporting more than 4,000 independent financial advisors nationwide. Since 1974, Raymond James Financial Services, Inc., member FINRA/SIPC, has provided a wide range of investment and wealth planning related services through its affiliate, Raymond James & Associates, Inc., member New York Stock Exchange/SIPC. Both broker/dealers are wholly owned subsidiaries of Raymond James Financial, Inc. (NYSE-RJF), a leading diversified financial services company with approximately 7,700 financial advisors serving approximately 3 million client accounts in more than 3,000 locations throughout the United States, Canada and overseas. Total client assets are approximately \$750 billion.

About First Tech Federal Credit Union

First Tech Federal Credit Union is a \$12+ billion institution headquartered in San Jose, California. It is the nation's premier credit union serving the world's leading technology-oriented companies and their employees, including HP Inc., Hewlett Packard Enterprise, Microsoft, Agilent, Intel, Cisco, Amazon, Nike, Intuit, Google, and more. First Tech is recognized as the industry catalyst for delivering effortless banking experiences to more than 550,000 members through its 41 branch locations, more than 5,600 CO-OP Shared Branch locations, 30,000 CO-OP Network ATMs, and online platforms. First Tech offers a full range of financial services, including traditional banking, online banking, mortgages, financial planning, various consumer loans, and insurance services. Federally insured by NCUA. Equal Housing Lender. For more information, visit www.firsttechfed.com.

About SHOOK Research:

* Past performance is not indicative of future results. Individual experiences may vary. As America's only wealth adviser research organization, SHOOK Research recognizes the most outstanding wealth advisers in the business. The firm's host of quantitative and qualitative deep due-diligence measures includes telephone and in-person meetings. The firm shares its best practices research through conferences and speaking engagements. For more information see www.SHOOKresearch.com.

The Forbes Next-Gen Wealth Advisors rankings, developed by [SHOOK Research](#), is based on an algorithm of qualitative criterion, mostly gained through telephone and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of four years' experience, and the algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass the highest standards of best practices. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Out of 29,334 advisors nominated by their firms, 6,389 individuals considered for our Next-Gen ranking, based on thresholds and 1,484 received the award.

This ranking is not indicative of advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Raymond James is not affiliated with Forbes or Shook Research, LLC. Links are being provided for information purposes only. Raymond James is not affiliated with and does not endorse, authorize or sponsor any of the listed websites or their respective sponsors. Raymond James is not responsible for the content of any website or the collection or use of information regarding any website's users and/or members.

###