



**FOR IMMEDIATE RELEASE**

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**FOUR FINANCIAL ADVISORS AT ADDISON AVENUE NAMED TO  
FORBES' 2019 BEST-IN-STATE WEALTH ADVISORS LIST**

**ROCKLIN, CALIF. – APRIL 1, 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 Kimberlee Bouska, Bert Browen, Brett Everhart and Michael Lipkins were recently named to Forbes' [Best-In-State Wealth Advisors list](#). The Forbes' list recognizes standout wealth advisors from national, regional and independent firms.

This year's Best-In-State Wealth Advisors list honors over 3,000 top advisors across the country who were nominated by their firms and assigned a ranking within their respective states. Kimberlee Bouska was recognized in the state of Oregon, Bert Browen was recognized in Idaho, and Brett Everhart and Michael Lipkins were recognized in California.

"We're proud to have such a strong team of dedicated advisors who are passionate about guiding clients towards their financial goals," Addison Avenue president and investment executive, Scott Jenner said. "At Addison Avenue, our advisors work tirelessly to develop individually tailored, comprehensive financial plans, with the goal of creating financial solutions and fostering long-term client relationships."

Selections for the Best-In-State Wealth Advisors list were determined by SHOOK Research using an algorithm-based platform that analyzes qualitative and quantitative data to rate thousands of advisors across the nation. Each advisor was chosen based on factors including in-person interviews, industry experience, compliance records, and revenue and assets produced under management. Neither Forbes nor Shook receives a fee in exchange for rankings.<sup>1</sup>

**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 nation<sup>2</sup>, with Raymond James 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.

<sup>2</sup>Raymond James is not affiliated with Kehrer Bielan Research & Consulting.

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### **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](http://www.firsttechfed.com).

### **About SHOOK Research:**

<sup>1</sup>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](http://www.SHOOKresearch.com).

The Forbes ranking of Best-In-State Wealth Advisors, developed by SHOOK Research is based on an algorithm of qualitative criteria and quantitative data. Those advisors that are considered have a minimum of 7 years of experience, and the algorithm weighs factors like revenue trends, AUM, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. 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, 3,477 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.

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