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## FINANCIAL ADVISOR BRETT EVERHART NAMED #1 TO BANK INVESTMENT CONSULTANT'S TOP 100 BANK ADVISORS: WHO HAS THE MOST EXPERIENCE LIST

**SAN DIEGO, CALIF. – APRIL 5, 2017** – 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 advisor Brett Everhart was named No.1 on the prestigious list of 100 that was revealed on March 2.

The <u>Top 100 Bank Advisors: Who Has the Most Experience</u> list was ranked based on a weighted average of multiple variables.\* BIC is the dedicated resource for bank-based financial advisors and wealth managers and serves the needs of these professionals, bringing deep resources and an authoritative perspective.

Everhart's tenure is a testament of his commitment to his clients. For more than 35 years, Brett has dedicated his professional career to guiding his clients on the most important savings plans of their lives. As a CERTIFIED FINANCIAL PLANNNER<sup>TM</sup> professional, he is held to a higher fiduciary standard of care and commitment to meeting the ever-changing needs of his clients.

"We are very fortunate to have Brett on our team, and it's great to see him be recognized," Addison Avenue Investment Services President and Investment Executive, Scott Jenner said. "His dedication to his clients and willingness to help other advisors succeed are just two of the many attributes that make him a leader in this industry."

\*Factors in the BIC Top 100 ranking are weighted on an average of six variables. Those variables include: (1) Assets under management; (2) trailing-12 production; (3) % change in AUM from previous year; (4) % change in trailing-12; (5) amount of fee-based business; and (6) ratio of production-per-AUM. Advisers were reviewed and re-ranked based solely on assets-under-management. For the most tenured advisors list, advisors ranked in the BIC Top 100 were re-ranked based on their years in the industry. While job tenure wasn't one of the factors in the BIC Top 100 Advisors ranking it was an extra stat listed in each adviser's biography. These rankings may not be representative of any one client's experience, and are not indicative of future investment performance. Neither Raymond James nor any of its Financial Advisors paid a fee in exchange for these awards/ratings. BIC is not affiliated with Raymond James.

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## **About Addison Avenue Investment Services**

Addison Avenue Investment Services is the recognized investment services program provided by the Financial Advisors of First Tech Federal Credit Union. 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 \*\*, with Raymond James Financial Advisors managing \$3.1 billion in

assets for First Tech's 425,000 members. There are more than 29 Raymond James Financial Advisors operating in 40 First Tech branches across eight states.

Financial Advisors offer securities through Raymond James Financial Services, Inc. Member <u>FINRA/SIPC</u> 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. Raymond James is not affiliated with First Tech Federal Credit Union or Addison Avenue Investment Services. Investment advisory services offered through Raymond James Financial Services Advisors, Inc. Raymond James is not affiliated with Kehrer Bielan Research & Consulting.

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## **About First Tech Federal Credit Union**

First Tech Federal Credit Union is a \$9.4 billion institution headquartered in Mountain View, Calif. 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, CH2M, Intuit, Google and more. First Tech is recognized as the industry catalyst for delivering effortless banking experiences to its 425,000 members through its 40 branch locations, more than 5,000 CO-OP Branch locations, and 30,000 CO-OP Network ATMs. First Tech offers a full range of banking services, including traditional banking, mortgage, financial planning and insurance services. For more information, visit firsttechfed.com.

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<sup>\*\*</sup>Kehrer Bielan Research & Consulting, 2015