

Financial Advisors Kimberlee Bouska and Kathy Wills Recognized on Working Mother Magazine's 2020 Top Wealth Advisor Moms List

SAN JOSE, Calif. and HILLSBORO, Ore. – December 16, 2020 – [Raymond James Financial Services, Inc.](#) and [Addison Avenue Investment Services](#), the investment services division of [First Tech Federal Credit Union](#), announced that Working Mother magazine named Financial Advisors Kimberlee Bouska and Kathy Wills on its 2020 Top Wealth Advisor Moms list. The list recognizes today's most successful mothers working in financial advising across the U.S.

In collaboration with SHOOK Research, Working Mother magazine determines rankings based on a number of factors, including: interviews, surveys, service models, investing process, client retention, industry experience, review of compliance records, firm nominations, as well as assets under management and revenue generated for the recipients' respective firm. Women advisors with children 21 or younger still living at home were eligible.

As a CERTIFIED FINANCIAL PLANNER™ with nearly 20 years of experience, Bouska serves as an Investment Management Consultant at Addison Avenue. Her specialty lies in understanding the uniqueness of each financial journey and developing custom financial plans. Earning recognition from Working Mother magazine for the past three years in a row, Bouska also made the 2020 Forbes Best-in-State Wealth Advisor¹ and 2020 Forbes America's Top Women Advisors² lists.

Joining Addison Avenue in 2012, Wills enjoys connecting with her clients on a personal level. As a Financial Advisor, she empowers them to take charge of their finances and helps them prepare for the future by focusing on retirement planning, investment analysis and risk management.

"Kimberlee Bouska and Kathy Wills are deeply committed to helping individuals and families secure their financial future, and we're thrilled to see the great work they're doing recognized," said Scott Jenner, Addison Avenue President and Investment Executive. "They are excellent examples of our people-before-profits philosophy, always putting the needs of our members first."

View the full list of Working Mothers' 2020 Top Wealth Advisor Moms [here](#).

To reach the advisors at Addison Avenue Investment Services, visit <https://www.firsttechfed.com/invest> or call 855.744.8585.

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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 manages more than \$4.3 billion² in assets for First Tech's 620,000+ members. There are 35 advisors operating in 39 First Tech branches across eight states.

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. First Tech is recognized as the industry catalyst for delivering effortless banking experiences to more than 620,000 members through its 39 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.

SHOOK™ Research considered Wealth Advisors who are mothers with children living at home and under the age of 21. Ranking algorithm is based on qualitative measures derived from telephone and in-person interviews and surveys: service models, investing process, client retention, industry experience, review of compliance records, firm nominations, etc.; and 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. Neither SHOOK nor Working Mother receives compensation from the advisors or their firms in exchange for placement on a ranking. Research Summary (as of 3/31/2020): from a total universe of 300,000 advisors, based on our thresholds we received 32,350 nominations, of which approximately 20% (6,600) were women and less than a quarter (1,238) at the time were mothers with children under the age of 21 and living at home. A final list of the top 500 advisors was then compiled based upon the quantitative criteria. Raymond James is not affiliated with Working Mother or Shook Research, LLC. 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. For more information see www.SHOOKresearch.com.

1 The Forbes ranking of Best-In-State Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of seven years of experience, and the algorithm weights factors like revenue trends, assets under management, 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 approximately 32,000 nominations, more than 4,000 advisors 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. Please visit <https://www.forbes.com/best-in-state-wealth-advisors> for more info.

2 The **Forbes** ranking of [America's Top 1,000 Women Wealth Advisors](#), developed by **SHOOK Research**, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors with a minimum of 7 years of experience and weighing factors like revenue trends, AUM, compliance records, industry experience and best practices learned through telephone and in-person interviews. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. **Research Summary** (as of April 2019): 32,000 nominations were received based on thresholds (9,654 women) and 1,000 won. This

ranking is not indicative of advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Forbes nor SHOOK receive a fee in exchange for rankings. Raymond James is not affiliated with Forbes or Shook Research, LLC. Please visit <https://www.forbes.com/top-women-advisors/#28abc5bd51f4> for more info.

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