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**FINANCIAL ADVISORS KIMBERLEE BOUSKA, LAURA PEDRONCELLI AND
KASHA MCLEMORE NAMED TO FORBES' 2020 TOP WOMEN WEALTH ADVISOR LIST**

ROCKLIN, CALIF. – AUGUST 31, 2020 – [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](#), [Laura Pedroncelli](#), and [Kasha McLemore](#), were named to Forbes' 2020 [Best-In-State Wealth Advisors list](#). The list recognizes standout wealth advisors from national, regional and independent firms.

This is the first year advisors with Addison Avenue have appeared on the Forbes list, which was developed by SHOOK Research in 2017 to recognize top women advisors across the country. The ranking is based on qualitative and quantitative data, weighing factors including revenue, assets under management, compliance records, industry experience and best practices learned through telephone and in-person interviews.

Each recipient has made a profound impact on financial services by dedicating herself to the financial empowerment of women. All three women have won multiple awards for providing the highest quality of services to their clients.

Bouska is a CERTIFIED FINANCIAL PLANNER™ professional, the industry standard of excellence for competent and ethical personal financial planning, and has more than 20 years of experience in financial advising. In addition to this award, she is also a 2020 Forbes Best-in-State Wealth Advisor and a Top Wealth Advisor Mom, recognized by Working Mother Magazine for the last three years.

With over 23 years in the industry, Pedroncelli is dedicated to educating clients about the importance of women's financial knowledge. She is also a 2020 Forbes Best-in-State Wealth Advisor, and has been named to Bank Investment Consultant's (BIC's) Top 100 Advisors list for the past three years in a row.

In addition to being a Forbes Top Woman, McLemore, who joined Addison Avenue in 2011 has more than 18 years of experience in the financial services industry. She focuses on helping clients succeed financially by developing investment plans and strategies consistent with their long-term goals. She was also named to the Forbes Next Generation Wealth Advisor list in 2019.

"Congratulations to each of our advisors for this outstanding achievement," Addison Avenue President and Investment Executive, Scott Jenner said. "We are committed to making Addison Avenue the most admired investment services provider in our industry."

The full list of Forbes Top Women Wealth Advisors can be found [here](#).

To reach the advisors at Addison Avenue Investment Services, visit firsttechfed.com/investments 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 has helped make their credit union investment program the largest in the nation¹ with its Financial Advisors managing more than \$4.2 billion² in assets for First Tech's 620,000+ members. There are 35 advisors operating in 41 First Tech branches across eight states.

¹Kehrer Bielan Research & Consulting, 2018. Raymond James is not affiliated with Kehrer Bielan Research & Consulting.

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 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.

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.

About Raymond James Financial Services

Raymond James Financial, Inc. (NYSE: RJF) is a leading diversified financial services company providing private client group, capital markets, asset management, banking and other services to individuals, corporations and municipalities. The company has approximately 8,100 financial advisors throughout the United States, Canada and overseas. Total client assets are \$774 billion as of 3.31.20. Public since 1983, the firm is listed on the New York Stock Exchange under the symbol RJF. Additional information is available at raymondjames.com. Past performance is not an indication of future results. The information provided is for informational purposes only and is not a solicitation to buy or sell Raymond James Financial stock.

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.

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. For more information see www.SHOOKresearch.com. Data as of 3/31/2019. From a total universe of 300,000 advisors, based on our thresholds we received 30,691 nominations, of which approximately 20% (6,000) were women and less than half (<3,000) at the time were mothers with children under the age of 21 and living at home. A final list of the top 400 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.

To compile the list, multiple variables were combined into one composite score. The six categories used are: (1) assets under management; (2) trailing-12 month production; (3) percentage increase in AUM from the previous year; (4) percentage increase in T-12 production; (5) amount of fee business; and (6) the ratio of production-per-AUM. (Note: 2018 AUM was defined as the amount an advisor had as of Aug. 31, 2018. Likewise, for T-12 production, the 12-month period ending Aug. 31, 2018 was used.) The nominees were ranked by each of the six categories and then six different scores were calculated based on where they ranked. Those six scores were used to compile the final list. The ranking may not be representative of any one client's experience, is not an endorsement, and is not indicative of advisor's future performance. Neither Raymond James nor any of its Financial Advisors pay a fee in exchange for this award/rating. BIC is not affiliated with Raymond James.

SHOOK Research considered advisors born in 1980 or later with a minimum 4 years relevant experience. Advisors have built their own practices and lead their teams; joined teams and are viewed as future leadership; or a combination of both. 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 criteria 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 Forbes receives compensation from the advisors or their firms in exchange for placement on a ranking. Raymond James is not affiliated with Forbes 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. Out of 6,389 advisors considered, 1,489 made the final list in 2019. For more information see www.SHOOKresearch.com.

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