

**FOR IMMEDIATE RELEASE**

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**FINANCIAL ADVISORS BERT BROWEN, BRETT EVERHART, KIMBERLEE BOUSKA AND LAURA PEDRONCELLI NAMED TO FORBES' 2019 BEST-IN-STATE WEALTH ADVISORS LIST**

**ROCKLIN, CALIF. – MAY 7, 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 [Laura Pedroncelli](#), [Kimberlee Bouska](#), [Bert Browen](#), and [Brett Everhart](#), were recently named to Forbes' 2019 [Best-In-State Wealth Advisors list](#). The list recognizes standout wealth advisors from national, regional and independent firms.

This year's Best-In-State Wealth Advisors list spotlights over 4,000 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 in Idaho, and Brett Everhart and Laura Pedroncelli 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."

To reach the advisors at Addison Avenue Investment Services, more information can be found at [firsttechfed.com/investments](http://firsttechfed.com/investments) or by calling 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 nation<sup>1</sup> with its Financial Advisors managing more than \$4.2 billion<sup>2</sup> in assets for First Tech's 620,000+ members. There are 35 advisors operating in 41 First Tech branches across eight states.

<sup>1</sup>Kehrer Bielan Research & Consulting, 2018. Raymond James is not affiliated with Kehrer Bielan Research & Consulting.

<sup>2</sup>As of 12/31/2019. 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.

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

**About Forbes Ranking of Best-In-State Wealth Advisors**

Data provided by [SHOOKTM Research, LLC](http://SHOOKTM.com). Data as of 6/30/19. Source: [Forbes.com](http://Forbes.com) (January, 2020). 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 who are considered have a minimum of seven years of experience, and the algorithm weighs factors like revenue trends, AUM, compliance records, industry experience and those who 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 advisors nominated by their firms, 4,000 received the award. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of an individual client's 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. For more information: [www.SHOOKresearch.com](http://www.SHOOKresearch.com).

**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 \$896 billion. \*Public since 1983, the firm is listed on the New York Stock Exchange under the symbol RJF. Additional information is available at [raymondjames.com](http://raymondjames.com).

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