

IN THE NEWS:



**SCHWARTZ & SCHWARTZ SELECTED AS A 2011 WINNER *BOSTON* MAGAZINE'S
"FIVE-STAR WEALTH MANAGER - BEST IN CLIENT SATISFACTION"**

November, 2010 (Boston, MA) – For the second consecutive year, Schwartz & Schwartz is proud to announce that we've been **named a 2011 *Boston* magazine FIVE STAR Wealth Manager - Best in Client Satisfaction**. We were also awarded the honor in 2010.

Boston magazine contracted with an independent market research company, Crescendo Business Services, to administer a rigorous research process to identify a select group of wealth managers who are exceptional in both their ability and commitment to overall client satisfaction.

Wealth managers are individuals who help prepare and/or implement aspects of their client's financial plan. Common examples of wealth managers are financial planners, investment advisors, estate attorneys, accountants etc.

More than 100,000 high net worth consumers and 10,000 financial services professionals were asked to evaluate wealth managers in the Boston community. On the surveys, recipients were asked to evaluate only wealth managers whom they knew through personal experience, and to evaluate them based upon nine criteria: customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting of financial objectives, post-sale service, quality of recommendations and overall satisfaction. Only wealth managers with five years of experience in the financial services industry were considered. Next, each wealth manager was reviewed for regulatory actions, civil judicial actions and customer complaints as reported by FINRA (the Financial Industry Regulatory Authority) and other regulatory agencies. The final list was reviewed by a blue ribbon panel of local financial services industry professionals. Fewer than seven percent of the wealth managers in the Boston area were selected.

The 2010 list of FIVE STAR Wealth Managers will be shared with the Boston community in the February issue of Boston magazine.

**Crescendo Business Services conducted independent research to find the best in client satisfaction Wealth Managers. This award is given to just 7% of all professionals within a specific industry and market area. Wealth Managers do not pay a fee to be included in the research or the final list. For additional information regarding the criteria and methodology used to determine these rankings please visit <http://www.fivestarprofessional.com/fiveStarAssets/pdfs/GenericResearchWM.pdf>*

**Third-party rankings and recognitions are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation.*