



***InvestmentNews* honors the 2013 'Best Practices'**

First annual best practices awards recognizes 24 advisory practices for excellence in human capital management and technology



(Chicago, IL) – *InvestmentNews* has announced the winners of the first annual Best Practices awards, acknowledging 24 advisory firms for excellence in two categories: human capital management and technology.

The 2013 Best Practices winners were identified by their participation and performance in both the 2013 *InvestmentNews*/Moss Adams Adviser Compensation & Staffing Study and the 2013 *InvestmentNews* Adviser Technology Study.

Specifically, *InvestmentNews* Research created composite scores that examined the rate of growth, profitability and productivity levels, in addition to other study-specific data, for all of the participants in both 2013 studies. The “Top Performers” and “Innovators” were among the top-quartile of all participants and their selection as a Best Practice winner was based on their overall composite scores, as well as interviews with members of the *InvestmentNews* Best Practices Committee.

“From a research standpoint, we have recognized the top performing firms at an aggregate level for years as a way to help advisers benchmark themselves and grow their practices,” said Mark Bruno, director of digital and data strategy at *InvestmentNews*. “But this is the first time that we have recognized top performers and innovators on an individual level. Their accomplishments and stories will help educate, inform and influence the growth of this industry.”

With the 24 *InvestmentNews* Best Practices now confirmed, *InvestmentNews* will begin to profile each of the firms every other week for the next year across its print and digital properties. A new Best Practices column and video series will be woven into the fabric of *InvestmentNews*' editorial and research offerings and a new set of Best Practices will be identified each year. Firms must participate in an *InvestmentNews* Research benchmarking study in order to be considered.

For 2013, the InvestmentNews Best Practices are:

Human Capital Management, Industry Innovators:

Balasa Dinverno Foltz LLC, Itasca, Ill.
Briaud Financial Advisors, College Station, Texas
Fish & Associates, Memphis, Tenn.
JMG Financial Group Ltd., Oak Brook, Ill.
JVL Associates LLC, Wyoming, Mich., jvlassociates.com
Singer Xenos Wealth Management, Coral Gables, Fla.

Human Capital Management, Top-Performing firms:

Johnson Carriar Kruchten Anderson & Associates, Saint Cloud, Minn.
Pinnacle Advisory Group Inc., Columbia, Md.
Rinvelt & David LLC, Grand Rapids, Mich.
Roof Advisory Group Inc., Harrisburg, Pa.
Vintage Financial Services LLC, Ann Arbor, Mich.
Willow Street Advisors LLC, Naples, Fla.

Overall Use of Technology, Industry Innovators:

Empirical Wealth Management, Seattle
Financial Plan Inc., Bellingham, Wash.
Joseph Barry Co. LLC, New Bedford, Mass.
Searcy Financial Services Inc., Overland Park, Kan.
Strategic Capital Allocation Group LLC, Boston
The Arkansas Financial Group Inc., Little Rock, Ark.

Overall Use of Technology, Top-Performing Firms:

Bedrock Capital Management Inc., Los Altos, Calif.
Budros Ruhlín & Roe Inc., Columbus, Ohio
Evensky & Katz LLC, Coral Gables, Fla.
Roof Advisory Group Inc., Harrisburg, Pa.
Shelton Financial Group Inc., Fort Wayne, Ind.
Yellow Brick Road Financial Advisors LLC, San Francisco

Contact:

Morgan Lucio

Project Manager

InvestmentNews

mlucio@investmentnews.com

212-210-0417