The Linn Group

STRENGTHENING YOUR FINANCIAL SECURITY

Since 1968 our team has been managing the wealth of four generations of families over the course of five decades. With a steadfast commitment to supporting our clients through life's milestones and challenges, we seek to educate them about their financial picture and build robust portfolios. Our goal is to understand your financial objectives, gather your current financial information, develop smart strategies, and implement thoughtful and creative solutions. Throughout, we provide timely, ongoing service that can help clients feel secure and well-guided. We invest clients' money with the same care and attention with which we invest our own money and our family's money. We also view financial advising not simply as investment advice, but as a personalized financial education to aid clients in all their major life decisions. As we coach clients through their financial affairs and develop a fortified wealth management plan, we emphasize financial literacy and unique solutions.

The way that we structure our team is that everyone on board is here to help - every team member is open to every client, all the time. Rather than having just one person on our team assigned to a client relationship, each team member possesses the knowledge to service the needs of every single client, their families, and their singular financial situation. We put our client's interests above all else. We invite you to contact us today or visit our website to learn more about our wealth management approach and how we can help you achieve your goals.

SPECIALIZATION Wealth planning, retirement planning, investment management, estate planning services and wealth transfer, philanthropy, insurance and annuity reviews, tax considerations, cash flow management and budgeting, Social Security and Medicare questions, mortgage and real estate strategies

DESIGNATIONS, AFFILIATIONS, AND AWARDS

Michael J. Riley, CFP®: Managing Director - Financial Advisor, Senior Consulting Group

- Barron's Top 1,200 Advisor in 2022 and 2023
- *Forbes* Best-in-State Wealth Advisor in 2023

Tatyana Riley, MBA: Senior Vice President - Financial Advisor, Consulting Group
Brandon Hall: Senior Financial Associate
Linda Lang: Senior Registered Client Associate
Dawn McCoy: Senior Client Associate

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The 2023 Barron's "Top 1,200 Financial Advisors" award was announced March 2023. Data as of 9/30/2022. The 2022 Barron's "Top 1,200 Financial Advisors" award was announced March 2022. Data as of 9/30/2021. The award is based on the following criteria: The individual is credentialed as a FINRA registered representative, assets under management, revenue produced for the firm, regulatory and compliance record. The financial advisor does not pay a fee to be considered for or to receive this award. This award does not evaluate the quality of services provided to clients. This is not indicative of this financial advisor's future performance.
The 2023 Forbes "Best-In-State Wealth Advisors" award was announced April 2023. Data as of 6/30/2022. The award was developed by SHOOK Research and is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes: client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: 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 and not indicative of future performance or representative of any one client's experience. Neither Forbes nor SHOOK Research receive compensation in exchange for placement on the ranking. The financial advisor does not pay a fee to be considered for or to receive this award. This award does not evaluate the quality of services provided to clients. This is not indicative of this financial advisor's future performance. For more information: www.SHOOKresearch.com.

Investment and insurance products offered through RBC Wealth Management are not insured by the FDIC or any other federal government agency, are not deposits or other obligations of, or guaranteed by, a bank or any bank affiliate, and are subject to investment risks, including possible loss of the principal amount invested.

RBC Wealth Management does not provide tax or legal advice. All decisions regarding the tax or legal implications of your investments should be made in connection with your independent tax or legal advisor.

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