



## 2023 Forbes Best-In State Wealth Management Teams

### The Cates Team

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RBC Wealth Management is pleased to announce that The Cates Team was named to the Forbes Best-In-State Wealth Management Teams list in the U.S. This award was announced in January 2023 and is based on data as of March 31, 2022. Developed by SHOOK Research, the rating is also based on in-person, virtual and telephone due diligence meetings and a ranking algorithm that includes: a measure of each team's best practices, client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms.

**Please join us in congratulating The Cates Team on this noteworthy honor.**



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The 2023 Forbes Best-In-State Wealth Management Teams award was announced January 2023. Data as of 3/31/22. The award was developed by SHOOK Research and is based on in-person, virtual and telephone due diligence meetings and a ranking algorithm that includes: a measure of each team's best practices, 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. SHOOK's research and rankings provide opinions intended to help investors choose the right financial advisor and team, and are not indicative of future performance or representative of any one client's experience. Past performance is not an indication of future results. 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.

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