

Forbes Best-in-State Financial Security Professional 2026

I am proudly named as one of the Forbes | Shook Best-in-State Financial Security Professionals for 2026. My goal is to serve clients with unmatched excellence, so this award is a reflection of the real value I deliver to my clients. I strive to continue to prioritize providing reliable solutions and guidance to my clients.

I was chosen as one among a very small group of insurance professionals in the state to receive the recognition this year. The list features a ranking of the best insurance professionals whom families rely on for wealth preservation and protection. Financial Security Professionals were selected by an independent research firm based on various qualitative and quantitative data and one simple notion: "Would we recommend these professionals to a family member or friend?". You can learn more about SHOOK Research's methodology here

<https://www.forbes.com/sites/rjshook/2025/07/10/methodology-americas-top-financial-security-professionals-2025/>.

SHOOK Disclosures

The Forbes | SHOOK® Financial Security Professionals and Best-In-State Financial Security Professionals rankings are the product of SHOOK Research, LLC's independent research and due diligence and its proprietary ranking methodology. The rankings are published and distributed by Forbes. Data as of December 31, 2025. Published by Forbes (July 2026).

SHOOK Research's proprietary methodology and ranking algorithm incorporates in-person, virtual, and telephone due diligence meetings to evaluate each professional across criteria such as client impact, industry experience, client retention, review of best practices, credentials, compliance records, and firm nominations, as well as quantitative factors including assets under management, sales figures, and revenue generated for their firms. Financial Security Professional ("FSP") refers to those professionals who are properly licensed to sell life insurance and annuities. FSPs may also hold other credentials and licenses which would allow them to offer investments and securities products through those licenses.

Investment performance is not a criterion, as client objectives and risk tolerances vary and these professionals rarely have audited performance reports. SHOOK Research's rankings are intended to help investors identify and evaluate financial services professionals and are not indicative of future performance or representative of any one client's experience. Past performance is not indicative of future results. The rankings are for informational purposes only and should not be construed as a recommendation or endorsement to hire any specific financial services professional. SHOOK Research does not assume any liability for actions taken based on the rankings.

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