

Colter Lewis Ranked in Forbes Top RIA Firms 2024

We are proud to announce that Colter Lewis Investment Partners has been named to the Forbes America's Top RIA Firms 2024 list. This recognition reflects our commitment to guiding families of meaningful wealth with clarity, purpose, and partnership. We are honored to be acknowledged among leading Registered Investment Advisors ("RIA") across the country.

To compile the list of the top 250 RIAs in the country, Forbes hired SHOOK Research to analyze and compare the 46,212 nominations they received. While this is the third annual Forbes/Shook Top RIA list, it was the first time that Colter Lewis was eligible to be considered. Of the 25,103 RIAs that qualified, Colter Lewis was ranked in the top 1%.

For further information on Forbes' methodology, please [click here](#).

About the Forbes Top RIA Firms List

The Forbes ranking of America's Top RIA Firms is conducted in partnership with SHOOK Research. The goal of the ranking is to identify firms that demonstrate exceptional client service, strong compliance records, and long-term commitment to fiduciary excellence. Data provided by SHOOK® Research, LLC — Data as of 3/31/24. Source: Forbes.com (October, 2024). Forbes America's Top RIA Firm's ranking was developed by SHOOK Research. RIA Firm refers to those that are registered directly through the SEC as a registered investment advisor, those that file their form ADV within a corporate umbrella, or recognized practice groups associated with such a firm under a corporate umbrella. Rankings are based on in-person, virtual and telephone due diligence meetings and a ranking algorithm that includes: a measure of each firm'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 firm, 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. For more information, please see www.SHOOKresearch.com. SHOOK is a registered trademark of SHOOK Research, LLC.

Please Note: Neither rankings and/or recognitions by unaffiliated rating services, publications, media, or other organizations, should be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if Colter Lewis Investment Partners is engaged, or continues to be engaged, to provide investment advisory services. Rankings published by magazines, and others, generally base their selections exclusively on information prepared and/or submitted by the recognized adviser. Rankings are generally limited to participating advisers (see participation criteria/methodology). Unless expressly indicated to the contrary, Colter Lewis Investment Partners did not pay a fee to be included on any such ranking. No ranking or recognition should be construed as a current or past endorsement of Colter Lewis Investment Partners by any of its clients.