

Washingtonian Top Money Adviser Award

Disclosure

1. *Criteria for obtaining the Washingtonian Top Money Adviser Award:*

Debora May, along with other professionals that were listed in Washingtonian's Top Wealth Advisers article, were chosen via a survey of local money advisers and experts. Washingtonian sent a survey to hundreds of local financial planners, accountants, estate attorneys, insurance experts, and investment advisers and asked them whom they would trust with their own money. Advisers who got the strongest recommendations made the list. Washingtonian also did its own research and took into consideration other industry awards.

2. *The amount of any fee paid to receive the Washingtonian Top Money Adviser Award (either upfront to obtain the award or paid on the backend after the award was granted to obtain plaques, article reprints or other similar indicia of the award):*

There was no fee to receive the Washingtonian Top Money Adviser Award. There was also no obligation to buy a plaque. If an individual decided to buy a plaque, it cost \$100. It is also not required to purchase an article reprint. However, if an individual decided they would like an article reprint the cost varies depending on their selection.

3. *Whether we applied to receive the Washingtonian Top Money Adviser Award:*

Debora May did not apply to receive the Washingtonian Top Money Adviser Award.

4. *Whether membership to the organization was required to be eligible to receive the Washingtonian Top Money Adviser Award:*

Membership was not required to be eligible to receive the Washingtonian Top Money Adviser Award.

5. *The number of firms or individuals surveyed or nominated, and the percentage that received the rating of Washingtonian Top Money Adviser Award:*

Washingtonian is unsure of the exact number of individuals surveyed because the surveys were also distributed by Washington-area organizations that have financial advisers as members. However, Debora May was listed in the tax accountant category. Washingtonian received 219 nominations for different tax accountants. Debora May was one of the 48 tax accountants who made the final Washingtonian Top Money Adviser Award list.