

AMERICA'S TOP 1200 FINANCIAL ADVISORS

BARRON'S

MARCH 14, 2022



Roll With It

With interest rates, inflation, and volatility on the rise, financial advisors have their work cut out for them. Here's what some of the best are doing for their clients now.

© 2022 Dow Jones & Co. Inc.
 Licensed Use: Print and digital use
 Licensed To: Weatherly Asset Management
 Expiration Date: 4/7/2023

Cover: Ana Yael

2022 TOP ADVISOR RANKING

Rankings are based on assets under management, revenue generated for advisors' firms, and a variety of quality-of-practice measures, including advisors' compliance records.

Rank	2022	2021	Name	Firm	City	Customers			Total Assets (\$mil)	Typical Account (\$mil)	Typical Net Worth (\$mil)
						Individuals (Up to \$1 mil)	High Net Worth (\$1-10 mil)	Ultrahigh Net Worth (\$10 mil+)			

CALIFORNIA

78	87		Carolyn Taylor	Weatherly Asset Mgmt	Del Mar	•	•		1,150	3.1	5
----	----	--	----------------	----------------------	---------	---	---	--	-------	-----	---

THE PUBLISHER'S SALE OF THIS REPRINT DOES NOT CONSTITUTE OR IMPLY ANY ENDORSEMENT OR SPONSORSHIP OF ANY PRODUCT, SERVICE, COMPANY OR ORGANIZATION.
 Custom Reprints 800.843.0008 www.djreprints.com DO NOT EDIT OR ALTER REPRINT/REPRODUCTIONS NOT PERMITTED 59007

America's Top 1200 Financial Advisors

Our annual state-by-state ranking comes at a time of uncertainty on many fronts, but these experts are keeping a cool head.

The following has been excerpted

By Steve Garmhausen

For more than a decade, using market corrections as opportunities to load up on stocks has proved to be a winning strategy.

Right now, investment advisors have their work cut out for them. For the first time in years, they must navigate a rising interest-rate environment against a backdrop of sustained, elevated inflation and doubts about corporate-earnings durability. Covid-19, which is at the root of the inflation spike, remains a market headwind, while Russia's invasion of Ukraine

adds a fresh dose of uncertainty. At the same time, advisors must persuade clients who have benefited from growth investing or broad indexing that it might be time to tweak the formula.

This environment will test the investing skills of Barron's Top 1,200 Financial Advisors. Our ranking, which draws from all 50 states plus the District of Columbia, is the largest, most comprehensive of the annual advisor listings that we run. It includes a cross-section of private-wealth advisors, from independents who own and operate their own practices to advisors from the large Wall Street firms.

This special report lists the top advisors in each state, with the number of ranking spots determined by each state's population and wealth. The rankings are based on assets under management, revenue generated by advisors for their firms, and the quality of the advisors' practices. Investment performance isn't an explicit criterion because performance is often a function of each client's appetite for risk. In evaluating advisors, we examine regulatory records, internal company documents, and 100-plus points of data provided by the advisors themselves.



Weatherly Asset Management
832 Camino Del Mar, Suite 4
Del Mar, CA 92014

Tel: 858-259-4507 Fax: 858-259-0782
Email: carolyn@weatherlyassetmgt.com
www.weatherlyassetmgt.com

The criteria for ranking reflects assets under management as of 09/30/2021, revenue that the advisors generate for their Firms, regulatory record, quality of the advisor's practices, and philanthropic work. Investment performance is not an explicit criterion because the advisors' clients pursue a wide range of goals. In many instances, the primary goal is asset preservation. The scoring system assigns a top score of 100 and rates the rest by comparing them with the top-ranked advisor.

Carolyn Taylor was nominated for inclusion in the list. Survey data was submitted by around 6,000 advisors, but only 1200 were published in the ranking. Barron's uses a proprietary method to rank advisors based on the criteria above. Weatherly provides this data to Barron's in the form of a survey response. Initial ranking is done by Barron's; publicly available data is verified by Barron's against SEC and FINRA reports. Barron's then conducts the next level of ranking. Data that is not independently verified by Barron's is then sent back to the Firm for verification. Barron's then incorporates any required changes into the ranking, and finalizes the list for editorial use and publishing. The Top 1,200 are drawn from all 50 states, plus the District of Columbia. This ranking is the largest and most comprehensive of the annual Barron's advisor listings. It includes a cross section of private-wealth advisors, from independents who own and operate their own practices to advisors from the large Wall Street firms. This special report lists the top advisors in each state, with the number of ranking spots determined by each state's population and wealth. Carolyn Taylor ranked 78th in the state of California.

No payment was required for nomination or inclusion in the ranking. After receiving notice of inclusion in the top 1200 list, Weatherly plans to pay Dow Jones Reprints and Licensing for custom hard copy reprints and digital access. Wealth Managers do not pay a fee to be considered or placed on the final list.

No organizational memberships were required of the Firm or individuals. Ranking on this list is not representative of any one client's experience and is not indicative of Weatherly's future performance. Weatherly is not aware of any facts that would call into question the validity of the ranking or the appropriateness of advertising inclusion in this list.