

# MORAN

## WEALTH MANAGEMENT

Script for General MWM video

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#### **Disclaimers:**

**Tom Moran, Founder, CEO and Senior PIM Portfolio Manager has been named:**

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The **Forbes ranking of America's Top Wealth Advisors**, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of seven years' experience, and the algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings.

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