



## News Release

FOR IMMEDIATE RELEASE

### **Potomac Financial Group's Todd Wike Named to *Forbes* 2021 List of Top Wealth Advisors**

*Recognition follows recent naming to Raymond James' 2021 Chairman's Council*

CAVERTON, MARYLAND, February 23, 2021 – Potomac Financial Group (PFG), a Maryland-based provider of premier financial planning and wealth management services, announced today that Managing Partner, Todd Wike, has once again been named to *Forbes Magazines'* distinguished list of America's Best-in-State Wealth Advisors. The announcement follows his recent appointment as a member of the Raymond James' 2021 Chairman's Council.\* Mr. Wike has been a member of the prestigious Chairman's Council for several years, a privilege limited to a select few of Raymond James' top-achieving advisors.

"I am very grateful for both of these recognitions and extremely proud of the team at PFG. It's truly a testament to our unique company culture and passion for providing the best in client-centric care and thoughtful, comprehensive financial planning," said Todd Wike, Managing Partner at Potomac Financial Group, Financial Advisor and CERTIFIED FINANCIAL PLANNER™ professional at Raymond James Financial Services. "Collectively, we share an unequivocal commitment to helping our clients achieve their financial freedom and these two honors simply demonstrate that promise."

The *Forbes* ranking of Best-In-State 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 of experience, and the algorithm weights 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 criteria due to varying client objectives and lack of audited data. Out of approximately 32,725

nominations, more than 5,000 advisors received the award. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Raymond James is not affiliated with Forbes or Shook Research, LLC. Please visit <https://www.forbes.com/best-in-state-wealth-advisors> for more information.

**About Potomac Financial Group** | Since 1973, Potomac Financial Group (PFG) has served as a premier financial planning and wealth management firm singularly committed to helping its clients and families achieve financial independence and security. With almost 50 years of combined experience, PFG has grown to be one of the region's most trusted financial planning firms through its innovative financial solutions and commitment to exemplary personal care. To learn more, visit [PotomacFinancialGroup.com](http://PotomacFinancialGroup.com).

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\*Past performance is not indicative of future results. Membership is based on prior fiscal year production. Re-qualification is required annually. The ranking may not be representative of any one client's experience, is not an endorsement, and is not indicative of an advisor's future performance. No fee is paid in exchange for this award/rating.