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News Release

<u>FOR IMMEDIATE RELEASE</u>

Potomac Financial Group's Todd Wike Named to *Forbes* 2023 Best-in-State Wealth Advisors for Fourth Consecutive Year

CALVERTON, MARYLAND, April 12, 2022 – Potomac Financial Group (PFG), a Maryland-based team providing premier financial planning and wealth management services, announced today that Managing Partner Todd Wike has been named to *Forbes'* distinguished list of America's Best-in-State Wealth Advisors. Wike has also appeared on this prestigious list in each of the past four years. Nominees are carefully vetted. Financial planners are researched, interviewed and assigned a ranking based on an algorithm of qualitative and quantitative criteria. For 2023, Forbes received approximately 39,007 nominations and only 7,321 advisors received the award.

"With the market volatility this past year, we thank our clients for placing their continued confidence and trust in our team. We understand just how important we are in our clients' lives and the key role we play in helping them achieve their financial goals," said Todd Wike, Managing Partner at Potomac Financial Group, Financial Advisor and CERTIFIED FINANCIAL PLANNER™ professional at Raymond James Financial Services. "It's an honor to be recognized among the nation's leading wealth advisors for the fourth consecutive year, and it's a recognition that I proudly share with my entire team. Their dedication to comprehensive financial planning and commitment to the very best in client-centric care earned Potomac Financial Group this prestigious honor."

The Forbes Top Wealth Advisors Best-In-State 2023 ranking, 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. This ranking is based upon the period from 6/30/2021 to 6/30/2022 and was released on 4/4/2023. 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

39,007 nominations, 7,321 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/lists/best-in-state-wealth-advisors/?sh=181ba856ab97** for more info.

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.

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