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Please contact us by phone at 713-840-1000 if you have any doubts about whether an email, website, phone call or text message claiming to be from LW is legitimate.

For tips intended to help avoid cybersecurity threats and fraud, to prevent and respond to identity theft, and to assist with many other common issues, please visit the US Department of Homeland Security's Cybersecurity & Infrastructure Agency's Tips page at http://www.cisa.gov/uscert/ncas/tips or the SEC's Tips at https://www.investor.gov/introduction-investing/general-resources/news-alerts/alerts-bulletins/investor-alerts/social-media.

Barron's 2024 Top 100 RIA Firms List

For more information about the Barron's 2024 Top 100 RIA Firms List, please visit Barron's website.

Barron's is a weekly magazine/newspaper published by Dow Jones & Company that conducted the survey. Advisory firms who wish to be ranked fill out a 102-question survey about their practice. Barron's verifies that data with the advisors' firms and with regulatory databases and then applies its rankings formula to the data to generate a ranking. The ranking reflects the volume of assets overseen by the advisory firms, revenues generated for the firms, and the quality of the advisory firms' practices. Ranking awarded in September 2024 based on data within a 12-month period. Linscomb Wealth is not aware of any undisclosed facts that would call into question the validity or appropriateness of the rating. Licensing fees paid post award for use of the ranking and Barron's logo.

Financial Advisor 2024 RIA Survey and Ranking

For more information about the Financial Advisor 2024 RIA Survey and Ranking, please visit https://www.fa-mag.com and FA 2024 RIA Survey and Ranking.

Financial Advisor (FA) delivers essential market information and strategies that advisors need to succeed in their increasingly complex environment. FA focuses on sophisticated planning and investment strategies to help advisors better serve their affluent clients, as well as practice management ideas to help advisors build their firms. FA goes in-depth to challenge traditional planning wisdom by introducing readers to new approaches to help them better counsel clients. To achieve these goals, FA continuously seeks to bring together the best team of editors and contributing writers to provide the most compelling publication for the top decision-makers in the financial advisory field.

FA conducts two surveys annually: RIA survey and Independent Broker-Dealer survey. Advisors who qualify to participate complete and submit information voluntarily to FA's survey. For this survey, 431 firms were ranked.

FA's RIA survey is a ranking based on assets under management at year end of independent RIA firms that file their own ADV with the SEC. FA's RIA ranking orders firms from largest to smallest, based on AUM reported to us by firms. To be eligible for the ranking, firms must be independent registered investment advisors and file their own ADV statement with the SEC and provide financial planning and related services to individual clients. Firms must have at least $500 million in assets under management as of December 31, 2023, to be included in the print edition of Financial Advisor Magazine's 2024 RIA survey.

The ranking was awarded on July 12, 2024. Licensing fees paid post award for use of the FA ranking logo in our marketing materials. The ranking covers the annual period ending December 31, 2023.

Hybrid RIA firms, corporate RIA firms and investment advisor representatives (IARs) are not eligible for this survey. A corporate RIA is a registered investment advisor most often formed by a broker-dealer that files an ADV with the SEC. Advisors who are affiliated with the broker-dealer or other entity's corporate RIA may offer investment advice. They are considered Investment Advisor Representatives (IARs) of the corporate RIA. All the assets under management of the IARs are included in the corporate RIA's ADV filed with the SEC.

InvestmentNews Awards

InvestmentNews is a news publication for financial advisors and wealth management professionals. The 2025 InvestmentNews Award for Excellence in Philanthropy & Community Service recognizes the advisor or advisory team whose outstanding contribution of time, leadership and financial support over a sustained period of time, beyond normal expectations, has made significant impacts in the receiving causes or communities. Self-nominations are welcomed. When judging this category, the following criteria are considered:

- Open to individuals and advisory teams
- Demonstration of major philanthropic and community service programs or initiatives over the last 12 months that align with broader corporate goals or strategies (i.e. company culture, employee engagement etc.)
- Impact on local, national, or international causes or communities
- Overall commitment to philanthropy and community service
- Testimonials from beneficiaries or partners

For a full description of InvestmentNews' process, please visit: Process | IN | InvestmentNews Awards

ThinkAdvisor Luminaries Awards 2025

ThinkAdvisor provides financial advisors, registered investment advisors and wealth managers with comprehensive coverage of the products, services and information they need to guide their clients in making critical wealth, health and life decisions.

The ThinkAdvisor Luminaries Awards honors outstanding individuals and firms in the financial services industry. Recognizing excellence beyond traditional metrics, such as asset growth or product enhancements, the Awards focus on exemplary leadership, groundbreaking innovation, and outstanding community impact by both firms and individuals. Nominations are open to organizations and individuals that work in these key segments of the financial services industry:

- Financial Advisory and Asset Management Firms *(RIAs, BDs, clearing and custody firms, asset managers, retirement plans, TAMPs, UHNW/family offices and wholesalers)*
- Technology Platforms, Products and Services *(business development, client engagement, financial planning, investment management and operations)*
- Advisory Support Products and Services *(advisor education, charitable giving, compliance/law firms, conferences and trade shows, industry associations, consultants, marketing/PR services, recruiting firms, research providers and trust companies)*

In evaluating nominations, ThinkAdvisors takes into consideration the following criteria:

- The nominee's impact on the firm, advisors, and the broader professional community and industry.
- This impact should include both quantitative and qualitative results – such as the number of advisors affected by the nominee and a clear description of the innovative ways the nominee has contributed to the particular program, firm and broader community, and industry.
- A demonstrated ability to achieve goals and display ingenuity in terms of creative thinking and

problem solving.
- A description of the nominee's dedication to furthering the development of advisors and the industry – most notably its ability to serve the best interests of clients.
- A personal commitment to the highest ethical standards, service and excellence.

There is no cost to submit a nomination. Submission to this award program is free. For a full description of ThinkAdvisor's process, please visit: https://event.thinkadvisor.com/luminaries-awards/8364630

WealthManagement.com Industry Awards

The Wealthies Awards are sponsored by Informa, a leading international events, digital services and academic research group. The annual WealthManagement.com Industry Awards celebrate companies, individuals and organizations that demonstrate outstanding achievement in support of financial advisor success. The finalist award for which LW is considered is the Client Initiative – Family Office Services category. The category considers a new initiative, program, platform or industry content that enhances the family officer client experience. Initiatives can include areas such as technology deployments, educations programs, client-facing technologies, reporting tools, next generation of advisor/client, etc. Criteria include both quantitative measures, such as specific feature set, usage, potential, scope, scale, etc., along with qualitative measures such as innovation, creativity, new methods of deployment, etc. Judging of submissions is led by wealthmanagement.com's program chair and comprises a panel of independent judges made up of top names in the wealth industry. For this year, there were over 1,000 entries received from more than 400 companies. The finalist award winners were announced on June 2, 2025. Licensing fees paid post award for use of the FA ranking logo in our marketing materials. The finalists award is for the year 2025. Winners will be announced on September 4, 2025. LW did not pay any fees to participate.

For a full description of Wealthies Awards process, please visit: https://informaconnect.com/wealth-management-industry-awards/judging-information/

Awards, Ratings and Rankings

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