



FOR IMMEDIATE RELEASE:

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FOR MORE INFORMATION:

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**Cornerstone Advisors Recognized as “Best in Client Satisfaction”
Bob Trenner, Ken Hart, Mike Hughes, Chuck Hammond, Sue Peterson,
Dave Drews, Dan Kwon, Mike Milojevich, and Dave Freudenberg
Among FIVE STAR Wealth Management Award Winners**

BELLEVUE, Wash. – Cornerstone Advisors is proud to announce that nine of its’ professionals are counted among the winners of this year’s FIVE STAR Best in Client Satisfaction Awards, an annual award program that recognizes local top wealth managers. This is the fourth consecutive year that professionals from Cornerstone Advisors are among the FIVE STAR “Best in Client Satisfaction” wealth managers. The program is administered by Crescendo Business Services and winners are currently featured in the April, 2010 issue of *Seattle Magazine*.

Crescendo Business Services contracts with QMI Research, an independent research firm to identify the “Best in Client Satisfaction” wealth managers serving the Seattle area. QMI Research surveyed by mail and by phone 130,000 high-net-worth residents in the Seattle area and subscribers of *Seattle Magazine*. An additional 8,150 surveys were sent to leaders of financial service industry professionals.

On the surveys, recipients were asked to select only wealth managers whom they knew through personal experience, and to evaluate them based on nine criteria; customer service, integrity, knowledge/ expertise, communication, value for fee charged, meeting of financial objectives, post-sale-service, quality of recommendations, and overall satisfaction.

Only wealth managers with five years of experience in the financial services, accounting or legal professions were considered. Next, each wealth manger was reviewed for regulatory actions, civil judicial actions, and customer complaints as reported by FINRA (the Financial Industry Regulatory Authority) and other regulatory agencies. Only FINRA licensees, CPAs and state licensed attorneys are eligible to appear on the final list of FIVE STAR Wealth Managers.

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Then, before finalizing the list, wealth managers were reviewed by a blue-ribbon panel. The blue-ribbon panel was comprised of knowledgeable individuals from within the financial services industry. Although panelist comments were incorporated into the final score, safeguards were built into the review process to reduce the ability of panel members to influence the composition of the final list on the basis of company affiliation. The resulting list of 2010 FIVE STAR Wealth Managers is an elite group, representing less than 7 percent of the wealth managers in the Seattle area.

Cornerstone Advisors Inc., a wealth and life building firm with \$2.0 billion in assets under management, was founded in 1984 with the sole purpose of equipping wealthy individuals, families, foundations and endowments to make sound financial decisions. The privately-held firm is headquartered in Bellevue, Wash. and has 42 employees. More information on the firm can be viewed online at www.buildbeyond.com

RESEARCH DECLARATIONS:

As with any research or recognition program, it is important that we provide you the following declarations:

- The 2010 FIVE STAR Wealth Managers do not pay a fee to be included in the research or the final list of FIVE STAR Wealth Managers.
- The overall evaluation score of a wealth manager reflects an average of all respondents and may not be representative of any one client's evaluation.
- The FIVE STAR Award is not indicative of the wealth manager's future performance.
- Wealth managers may or may not use discretion in their practice and therefore may not manage their client's assets.
- The inclusion of a wealth manager on the FIVE STAR Wealth Manager list should not be construed as an endorsement of the wealth manager by Crescendo Business Services or *Seattle Magazine*.
- Working with a FIVE STAR Wealth Manager or any wealth manager is no guarantee as to future investment success nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by Crescendo in the future.
- The research process for the FIVE STAR Wealth Manager Program, managed by QMI Research, incorporates a statistically valid sample in order to identify the wealth managers in the local market that score highest in overall satisfaction. QMI Research does not include wealth managers on the list unless their score is statistically valid. At least 50 percent of the wealth managers in the market have a statistically valid score.
- For more information on the FIVE STAR Award and the research/selection methodology, go to: fivestarpromotional.com/wmresearch.