

**FOR IMMEDIATE RELEASE:**  
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**Cornerstone Advisors Recognized as “Best in Client Satisfaction”**

**Ken Hart, David Freudenberg, Michael Hughes, Chuck Hammond, April Kriha, and Michael Milojevich Among FIVE STAR Wealth Management Award Winners**

BELLEVUE, Wash. – Six Members of Cornerstone Advisors Inc., a wealth and life building firm with more than \$1.75 billion in assets under management, are among the winners of this year’s FIVE STAR Best in Client Satisfaction Awards, an annual award program that recognizes the top wealth managers. Winners are currently featured in the April, 2009 issue of *Seattle Magazine*.

“This is an honor for our firm, and a testimony to the trust that our clients have in us,” said Robert F. Trenner, CEO of Cornerstone Advisors. “We are very proud of Ken, Mike, Chuck, April and Mike and their demonstrated skill and passion in helping clients achieve their unique financial and life goals.”

*Seattle* magazine formed a partnership with Crescendo Business Services, an independent research firm, to identify the “best in client satisfaction” wealth managers serving the Seattle area. In September, Crescendo surveyed, by mail and phone 40,000 high-net-worth residents in the Seattle area and subscribers of *Seattle* magazine. An additional 6,900 surveys were sent to leaders of financial service industry companies. On the surveys, recipients were asked to select only wealth managers whom they knew through personal experience, and to evaluate them based upon 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 industry were considered. Next, each wealth manager was reviewed for regulatory actions, civil judicial actions and customer complaints as reported by FINRA (the Financial Industry Regulatory Authority) and other regulatory agencies. Then, before finalizing the list, wealth managers were reviewed by a blue-ribbon panel. The blue-ribbon panel was comprised of knowledgeable

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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 2009 FIVE STAR Wealth Managers is an elite group, representing less than 4 percent of the wealth managers in the Seattle area. Only 448 of the top-scoring wealth managers made this year's list.

Founded in 1984, Cornerstone Advisors provides portfolio design, construction and management, family office services and financial counsel to wealthy individuals, families and organizations. The privately-held firm is headquartered in Bellevue, Wash. and has 43 employees. More information on the firm can be viewed online at [www.buildbeyond.com](http://www.buildbeyond.com).

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#### **RESEARCH DECLARATIONS:**

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

- The 2009 FIVE STAR Wealth Managers do not pay a fee to be included in the research or the final list of FIVE STAR Best in Client Satisfaction 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, *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: Best in Client Satisfaction Wealth Manager Program, managed by Quantitative Market Intelligence, incorporates a statistically valid sample in order to identify the wealth managers, of those evaluated, in the local market that scored highest in client satisfaction, with the final list representing less than 7% of the wealth managers in the local market.
- For more information on the FIVE STAR Award and the research/selection methodology, go to: [fivestarprofessional.com/wmresearch](http://fivestarprofessional.com/wmresearch).