

HOFFMAN

PRIVATE WEALTH GROUP

at Steward Partners

2021 Best-In-State Wealth Advisors

Todd M. Hoffman, CFP[®], CPM[®]

I have been named to the 2021 edition of the *Forbes* list of [Best-In-State Wealth Advisors](#). The list recognizes top financial advisors at banks, brokerages, custodians, insurance companies, clearing houses and others from across the U.S.

This year's Best-In-State Wealth Advisors list spotlights over 2,000 top-performing advisors across the country who were nominated by their firms – and then researched, interviewed and assigned a ranking within their respective states.

Unlike other advisor rankings, SHOOK is not a “robo-ranker” – numbers such as production and assets don't tell the whole story, especially when much of the data is self-reported. SHOOK Research creates rankings of role models – advisors that are leading the way in offering best practices and providing a high-quality experience for clients. A focus on both quantitative and qualitative factors, including telephone and in-person meetings, is imperative.

This achievement would not have been possible without your continued trust and support. Milestones like this serve to reinforce my belief that putting my clients – you – first is still the best way to do business.

As always, please contact me if you have any questions or would just like to discuss your portfolio.



Todd M. Hoffman CFP[®], CPM[®]

Founding Partner
Executive Managing Director
Senior Portfolio Management Director
Wealth Manager



2019, 2020, 2021, 2022
named one of Forbes
“Best-In-State Wealth Advisors”



2016 & 2017 named
one of Barron's
“Top 1,200 Financial Advisors”



2022 named one of
Advisor Hub's
“Top 50 Solo Practices to Watch”

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