

**Recognition for Altfest Personal Wealth Management<sup>®</sup>**

Top Rated Advisors in New York, NY  
AdvisoryHQ, 2016

300 Top Registered Investment Advisors in the Nation  
*Financial Times*, 2014, 2015

200 Leading Registered Investment Advisors in the U.S.  
*Financial Advisor*, 2006 - 2010, 2012, 2013, 2014, 2015

Best Practices Award  
*InvestmentNews*, 2014

Due Diligence/Research Manager All-Star Team Award  
*Financial Advisor*, 2012, 2013

Top 150 Wealth Managers  
*AdvisorOne\**, 2011, 2012

Bloomberg's Top 300 Wealth Managers in the Nation  
*Wealth Manager\**, 2003 - 2008, 2010

**Recognition of Our Principals**

Top 100 Independent Financial Advisors in the Nation  
*Barron's* - Lew Altfest, 2013, 2014, 2015, 2016

New York SmartCEO Family Business Award  
*SmartCEO* - Karen Altfest, 2016

Top 1,200 Financial Advisors in the Country  
*Barron's* - Lew Altfest, 2014, 2015, 2016

Top 20 Most Influential Women to Watch  
*InvestmentNews* - Karen Altfest, 2015

Top 100 Women Financial Advisors  
*Financial Times* - Karen Altfest, 2014

Advisor Hall of Fame Inductee  
*Research Magazine* - Lew Altfest, 2014

The Influencers: Lifetime Achievement Award  
*Financial Planning* - Lew and Karen Altfest, 2013

Best Financial Advisors for Dentists  
*Dental Practice Report* - Lew Altfest, 2011, 2012, 2013

150 Best Financial Advisors for Doctors  
*Medical Economics* - Lew Altfest, 1998–2013

NAPFA'S 30 Most Influential  
National Association of Personal Financial Advisors - Lew Altfest, 2013

Community Leadership Award  
*InvestmentNews* and Invest in Others Charitable Foundation - Karen Altfest, 2012

The 50 Distinguished Women in Wealth Management  
*Wealth Manager\** - Karen Altfest, 2008–2009

Top 250 Wealth Advisors in the Nation  
*Worth\** - Lew Altfest, 2008

Sole recipient of the 2007 *Charles R. Schwab IMPACT Award<sup>TM</sup>* - Lewis Altfest

*\*Publication has merged or ceased publication*



Financial Times Top 100 Women 2014





## Media Recognition

“Dedicated client service and getting to know them at a deeply personal level has resulted in a steady stream of referrals that keep Altfest Personal Wealth Management growing.”

*Investment News*, 2015

“Dreamer. Pioneer. Game changer. Lew Altfest, widely credited with changing financial planning for the better, is all those things.”

*Research Magazine*, 2014

Total Portfolio Management...blends analytical and personalized assessment to create customized client portfolios.

*Think Advisor*, 2014

Lew and Karen Altfest received “*Financial Planning’s* Lifetime Achievement Influencer Award for their shared roles in both spreading the gospel of objective, fee-only financial planning in the consumer marketplace, and for reaching out to women on personal financial issues.”

*Financial Planning*, 2013

Karen Altfest is “a highly ranked and regarded financial advisor.”

*The Wall Street Journal*, 2012

“Well respected for his value approach to investing, [Lew] Altfest is constantly scouring the globe for bargains.”

*Medscape*, 2012

Lew Altfest is one of the “financial planning profession’s most respected veterans.”

*Money*, 2009

Karen Altfest is “One of the most prominent female wealth managers in the business.”

*Wealth Manager*, 2008

“In this world of growing uncertainty, it can be reassuring to turn to a seasoned professional for advice and guidance. One of the country’s top financial planners is Lewis Altfest.”

PBS’ *WealthTrack*, 2006

If God needed a financial planner, “God would hire Lewis Altfest.”

*Gannett News Services*, 2006

“Lew Altfest is one of the best at poking holes in all of the foolish, misguided, and overly complex investment ideas people too often think are the solutions to their financial problems.”

*Kiplinger’s*, 1992