

## RECOGNITION FOR ALTFEST PERSONAL WEALTH MANAGEMENT®

*300 Top Registered Investment  
Advisors in the Nation*  
Financial Times, 2017

*Top Rated Advisors in New York, NY*  
AdvisoryHQ, 2016, 2017

*Leading Registered Investment  
Advisors in the U.S.*  
Financial Advisor, 2006 - 2010, 2012 - 2017

*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



\*Publication has merged or ceased publication

## RECOGNITION OF OUR PRINCIPALS

*America's Top Next-Generation Wealth Advisors*  
Forbes - Andrew Altfest, 2017

*America's Top 200 Women Advisors*  
Forbes - Karen Altfest, 2017

*Top 100 Independent Financial Advisors in the Nation*  
Barron's - Lew Altfest, 2013, 2014, 2015, 2016, 2017

*Top 1,200 Financial Advisors in the Country*  
Barron's - Lew Altfest, 2014, 2015, 2016, 2017

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

*Top 20 Most Influential Women to Watch in 2016*  
Investment News - 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™ - Lewis Altfest*