

## RECOGNITION FOR ALTFEST PERSONAL WEALTH MANAGEMENT®

*300 Top Registered Investment  
Advisors in the Nation*

Financial Times, 2014, 2015, 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 200 Women Advisors*

Forbes - Karen Altfest, 2017

*Top 1,200 Financial Advisors in the Country*

Barron's - Lew Altfest, 2014, 2015, 2016, 2017

*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 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*

## 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