



Justin Farris, CFP® and Jim Farris selected as 2014 FIVE STAR Wealth Managers

Justin Farris, CFP® and Jim Farris of The Farris Group have been named recipients of the Dallas/Ft. Worth Five Star Wealth Managers Award in *Texas Monthly* Magazine in the August 2014 issue.

This award comes from *Texas Monthly* magazine and Five Star Professional, who conducted research on wealth management professionals who provide their clients with financial services.

Over 5,080 candidates were nominated by their peers, their firms and their clients, and less than 13% percent of those wealth managers in north central Texas became award winners. Of the approximately 20,000+ wealth managers in north central Texas, Five Star Professional finalized the list of 2014 Five Star Wealth Managers in which 621 were named to the 2014 Five Star Wealth Managers list.

The Five Star Wealth Manager award, administered by Crescendo Business Services LLC (dba Five Star Professional) is based on 10 objective criteria: 1 Credentialed as a registered investment adviser or a registered investment advisor representative; 2. Active as a credentialed professional in the financial services industry for a minimum of 5 years; 3 Favorable regulatory and complaint history review (as defined by Five Star Professional, the wealth manager has not: A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three customer complaints filed against them {settled or pending} with any regulatory authority or complaints registered through Five Star Professional's consumer complaint process; C. Individually contributed to a financial settlement or a customer complaint filed with regulatory authority; D. Filed for personal bankruptcy; E. Been convicted of a felony); 4 Fulfilled their firm review based on internal standards; 5. Accepting new clients; 6. One-year client retention rate; 7. Five year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; Five Star Professional, as a third party research firm, identified pre-qualified award candidates based on industry education and professional designations. Wealth managers do not pay a fee to be considered or awarded. Once awarded, wealth managers may purchase additional profile ad space or promotional products. The award methodology does not evaluate the quality of services provided and is not indicative of the winner's future performance. 5,080 Dallas/Fort Worth wealth managers were considered for the award; 621 (13percentof candidates) were named Five Star Wealth Managers

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