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NEWS RELEASE

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MICHAEL ALLBEE NAMED ONE OF ADVISORHUB'S "ADVISORS TO WATCH" FOR 2025

IRVINE (June 23, 2025) – Michael Allbee, Principal and Senior Portfolio Manager, was ranked #83 in the Registered Investment Adviser category in the AdvisorHub "Advisors to Watch" ranking. The report can be seen [here](#).

According to AdvisorHub, the 250 advisors in the ranking have assembled efficient and productive teams that have achieved scale without compromising their level of service while maintaining healthy growth. "Since our founding, we've believed in doing the right kind of business, done the right way, and we go the extra mile to deliver a personalized client experience to the successful families and growing financial institutions that rely on us.", said Michael Allbee, Principal.

AdvisorHub collects data from advisory teams in three major categories:

1. **Scale of the business:** including assets under management, profitability, average account size, and the ratio of team members to client households.
2. **Growth of the business:** as measured by year-over-year increases in client households, assets, and profits.
3. **Professionalism:** which evaluates an advisor's regulatory record, certifications, years of service, and community involvement.

They also asked nominees to share something beyond the numbers about themselves or their teams and other qualitative questions.

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