

The 2024 list of Best Financial Planners (“Best Planners List”) is a collaborative effort of the Financial Planning Association (“FPA”) and Money intended to highlight financial planning professionals independently determined to possess the baseline skills, experience, and expertise most valued by clients who seek professional financial planning advice. The appearance of Kelly Oliven in the Best Planners List should not be construed to be a promise of any investment result or an endorsement of Kelly Oliven or William Blair by FPA, Money, or any current or former client of Kelly Oliven or William Blair. Likewise, the Best Planners List is not representative of the experience of any current or former client(s) of Kelly Oliven or William Blair. Clients and prospective clients should also consider that participation in the Best Planners List was limited only to CFP® professional members of FPA in good standing and did not include the entire universe of licensed financial planning professionals.

As part of applying for consideration to be included in the Best Planners List, Kelly Oliven responded to a questionnaire that was made available exclusively to all CFP® professional members of FPA in good standing. Approximately 1,006 FPA members responded to the questionnaire and were eligible to be included in the Best Planners List. The questionnaire was designed by FPA and Money to explore critical factors central to the financial planner-client relationship. It was informed through discussions with practicing financial planner professionals, empirical academic research, and a scoring system designed exclusively by Money. Data gleaned from the questionnaire resulted in the development of the Best Planners List, the results of which were not pre-determined or otherwise adjusted by either FPA or Money. Likewise, the Best Planners List was not determined based on a popular vote of the participating financial planner professionals or any clients or prospective clients.

While Kelly Oliven pays an annual membership fee of \$375 to FPA, payment of this fee and completion of the questionnaire did not guarantee or influence the probability of Kelly Oliven appearing in the Best Planners List or of the placement of Kelly Oliven within the Best Planners List. Further, Kelly Oliven was not required to pay any fees or other compensation of any kind to Money or any other group to have the opportunity to be included in the Best Planners List. Except as described above, Kelly Oliven is not affiliated with FPA or Money.

Various qualitative and quantitative criteria were considered in developing the scoring system for the Best Planners List, including each participating planner’s education, length of professional experience, level of ongoing training, disciplinary history (or lack thereof) and professional credentials. To capture aspects of the financial planning process that have traditionally been more difficult to evaluate, the scoring system further considered trust factors and client communication practices of participants in the Best Planners List by requiring them to quantify the importance they attach to such factors when working with their clients. To ensure objectivity in developing the Best Planners List and the scoring of participants, all self-identifying information of the participating planners was removed from questionnaire responses evaluated by Money. For more information on the methodology utilized to develop the Best Planners List, please visit <https://money.com/best-financial-planners/methodology/>