



Vertich renamed a member of Raymond James Financial Services 2021 Leaders Council

FORT MYERS, Fla. (Feb. 28, 2022) – Corey Vertich, CFP®, principal with Uhler and Vertich Financial Planners, has been reappointed as a member of the Raymond James Financial Services 2021 Leaders Council for the fifth consecutive year. *

This distinction is presented financial advisers who have demonstrated an extremely high level of commitment to clients through personal service and professional integrity. Membership is achieved by surpassing prescribed levels of fee and commission revenues or total branch revenue each fiscal year and annual requalification is required.

Vertich graduated Cum Laude from of Barry University School of Business and began his financial planning career in 1989, becoming a CFP®, CERTIFIED FINANCIAL PLANNER™ professional in 1994. Recognized by Forbes Magazine as a Best-In-State Wealth Advisor for 2020 and 2021, he currently co-chairs the annual giving campaign for United Way of Lee, Hendry and Glades Counties. He has previously served as president of the local chapters of the Institute of Certified Financial Planners and Financial Planning Association of Southwest Florida. Vertich was charter president of the Kiwanis Club of Iona McGregor. He is an Eagle Scout and a life member of the National Eagle Scout Association.

Uhler and Vertich Financial Planners, an independent registered investment advisory firm founded in 2002, is dedicated to the success of its clients' personal, family, financial and charitable goals. The firm's advisers assist families in becoming and remaining financially independent with comprehensive plans designed to maximize income, minimize taxes, protect against the unexpected and provide for the efficient transfer of accumulated wealth. Securities are offered through Raymond James Financial Services Inc., member FINRA/SIPC. To learn more about the team, located at 1510 Royal Palm Square Blvd. #103 in Fort Myers, visit www.uhlerandvertich.com or call 239-936-6300.

*Membership is based on prior fiscal year production. Re-qualification is required annually. The ranking may not be representative of any one client's experience, is not an endorsement, and is not indicative of advisers' future performance. No fee is paid in exchange for this award/rating.

The Forbes ranking of Best-In-State Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of seven years of experience, and the algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Out of approximately 32,725 nominations, more than 5,000 advisors received the award. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Raymond James is not affiliated with Forbes or Shook Research, LLC. Please visit <https://forbes.com/best-in-state-wealth-advisors> for more info.

Raymond James Financial Inc.

Raymond James Financial, Inc. (NYSE: RJF) is a leading diversified financial services company providing private client group, capital markets, asset management, banking and other services to individuals, corporations and municipalities. The company has approximately 8,500 financial advisers. Total client assets are \$1.26 trillion as of 12/31/2021. Public since 1983, the firm is listed on the New York Stock Exchange under the symbol RJF. Additional information is available at www.raymondjames.com.