FOR IMMEDIATE RELEASE

Vertich named among Forbes' Best-In-State Wealth Advisors

FORT MYERS, Fla. (Feb. 11, 2020) – Corey Vertich, CFP®, principal with Uhler and Vertich Financial Planners, was selected by Forbes magazine for its annual list of the top wealth advisors across the country.

Forbes' list spotlights wealth advisors who were chosen based on an algorithm of quantitative and qualitative criteria, including in-person interviews, industry experience, compliance records, revenue produced and assets under management. Vertich is one of five Fort Myers wealth advisors included on the list.

Vertich, a graduate of Barry University School of Business in Miami, began his financial planning career in 1989 and became a CFP®, CERTIFIED FINANCIAL PLANNER™ professional in 1994. He has 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 advisors 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.

Investment advisory services are offered through Uhler and Vertich Financial Planners. Uhler and Vertich Financial Planners is not a registered broker/dealer and is independent of Raymond James Financial Services.

Forbes Best-In-State Wealth Advisors 2020

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 32,000 nominations, more than 4,000 advisors received the award. This ranking is not indicative of 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.

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Contact:
Jennifer Hamilton, Gravina, Smith, Matte & Arnold Marketing and PR, Jennifer@GSMA.pro, 239-275-5758