Can you believe it? Tarantino Wealth Management is turning 21 this year! And what better way to celebrate than by sharing some fantastic recognitions recently received? These honors reflect the trust you've placed in us and the dedication of our entire team.

Forbes 2025 Best-In-State Wealth Advisors List

I'm thrilled to announce that I've been named to the Forbes 2025 Best-In-State Wealth Advisors List! This prestigious list, developed by SHOOK Research, highlights top financial advisors across the country based on qualitative and quantitative criteria, including client impact, industry experience, and assets under management. Being included is a true honor and a reflection of our commitment to excellence in wealth management.

The Forbes Best-In-State Wealth Advisor ranking, developed by SHOOK Research, is based on in-person and telephone due diligence meetings and a ranking algorithm that includes: client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK Research receives a fee in exchange for rankings.

I am honored to be named one of AdvisorHub's Top 100 Advisors to Watch in 2025!

This national recognition highlights advisors who are not only growing their businesses but also delivering exceptional service to clients. AdvisorHub evaluates candidates across three key categories:

- ❖ Scale of the business – including assets under management, profitability, average account! size, and the ratio of team members to client households.
- ❖ Growth of the business – measured by year-over-year increases in client households,! assets, and profits.
- ❖ Professionalism – based on an advisor's regulatory record, certifications, years of service,! and community involvement.

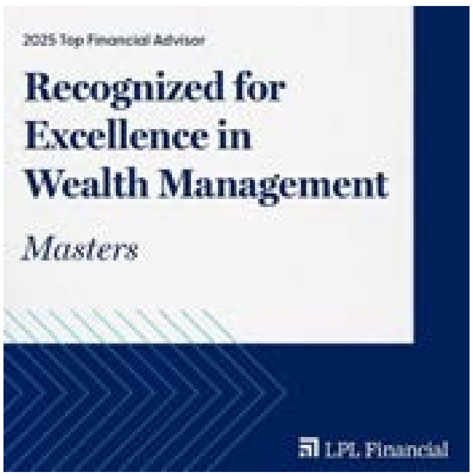
This award is a reflection of the hard work, dedication, and client-first approach that define my practice.

AdvisorHub issued AdvisorHub's Top 100 Advisors to Watch on 6/12/25 based on the following eligibility requirements and data for 12/31/23 – 12/31/24: 7+ years experience, $150+ mil in assets under management, 2+ years at current firm,regulatory history, scale, growth and professionalism. A total of 1984 applications were received and included team member/self-nominations with 700 award recipients being recognized among several sub-categories: RIAs (fee-only), Over $1bil, Under $1bil, Next Gen, Women, Solo, and Advisors to Watch. No fee was paid to participate or promote the award. This recognition is not an endorsement nor is it based on or indicative of any one client's experience with the financial advisor, past investment performance or a guarantee of future results.

Top Investment Advisors in Northern Colorado

I'm also proud to be recognized as one of BizWest's Top Investment Advisors in Northern Colorado. BizWest is a trusted source for business news in our region, and this accolade underscores our dedication to providing exceptional service to our Northern Colorado community.

Based on BizWest's Magazines reader votes. This award is not representative of the views of clients and is not indicative of future performance or services.



LPL Financial's Masters Club Program

Here's the cherry on top: I've been invited to join LPL Financial's Masters Club Program! This exclusive club is reserved for the top 6% of LPL advisors who are top performers with significant assets under management.

As we celebrate 21 years, we're more committed than ever to earning your trust every day and helping you navigate your financial journey with confidence. Here's to many more years of success and growth together!

With heartfelt gratitude,

Michael Tarantino, CFP®