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FREEDMAN FINANCIAL RECOGNIZED BY FORBES AS A BEST IN STATE WEALTH ADVISOR

Nationally Recognized and Ranked in the Top 20 Best-In-State for Massachusetts

[PEABODY, MA] — [FEBRUARY 17, 2021] – Marc Freedman of Freedman Financial was recently ranked No. 18 in Massachusetts* in Forbes' annually published Best-In-State Wealth Advisors. According to *Forbes*, the annual list highlights over 5,000 of the nation's top-performing advisors, nominated by their firms and then evaluated based on a qualitative algorithm and quantitative criteria administered by SHOOK Research. based on an algorithm of qualitative criteria, gained through telephone, virtual and in-person due diligence interviews, and quantitative data. Those advisors that are considered then goes through an algorithm that weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their approach to working with clients. **.

Unlike a "robo-ranker", SHOOK Research creates rankings of role models—advisors that are leading the way in offering best practices and providing a high-quality experience for clients. "The very best advisors are laser focused on having a positive impact on their clients' lives." says R.J. Shook, Founder & President of SHOOK Research and Senior Contributor to Forbes.

"They want to add meaning, help them live better lives."

Jason Yusypchuk, Vice President, Independent Advisor Services with LPL, Financial echoed the sentiment, “What an honor to receive this richly deserved national recognition. On behalf of the entire LPL Financial team, we thank you for your continued commitment to excellence. To be ranked among the top advisors in the country is truly an honor that demonstrates the outstanding results you achieve for your clients and your firm. We are extremely proud to be associated with you and the invaluable advice and service you provide to your clients.”

Marc Freedman is based in Peabody, MA and provides financial planning and investment management, and explains it this way, “Our approach is smart, yet uncomplicated,” he continues, “At Freedman Financial, real financial planning means having honest conversations. These help us guide our clients towards capitalizing on their life’s work. Our mission is to deliver a financial plan tailored to one’s personal needs, guided through life’s key financial conversations, and to make sure the families we serve are confident in our advice year after year.” Marc concludes with, “We Care. Deeply. is not just a part of our branding, it is how the entire Freedman team efforts to enrich the financial lives of our clients, every day.”

Marc Freedman is an LPL Financial advisor. LPL is the nation’s largest independent broker-dealer*** and a leader in the retail financial advice market, providing resources, tools and technology that support advisors in their work to enrich their clients’ financial lives.

About Freedman Financial

Located at 41 Cross Street, Peabody, above Daniella's Ristorante, Freedman Financial continues to serve the financial planning and investment management needs of the community with “financial advice in a language you can understand™”.

Freedman Financial of Peabody, MA currently serves the financial planning and investment management needs of 459 households and manages $474 Million as of 12/31/2020. They are registered investment advisor with the Securities and Exchange Commission. Securities are offered through LPL Financial. Member FINRA/SIPC.

Freedman Financial is a separate entity from LPL Financial.

If you would like more information about Freedman Financial, please contact Jodi Deldon, Director of First Impressions at 978-531-8108, jodi@freedmanfinancial.com or www.freedmanfinancial.com

About LPL Financial

LPL Financial is a leader in the retail financial advice market and the nation's largest independent broker-dealer***. We serve independent financial advisors and financial institutions, providing them with the technology, research, clearing and compliance services, and practice management programs they need to create and grow thriving practices. LPL enables them to provide objective guidance to millions of American families seeking wealth management, retirement planning, financial planning, and asset management solutions. LPL.com

* Massachusetts, excluding Boston.
** 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.

LPL Financial, Forbes magazine and SHOOK Research are all separate entities.

*** Based on total revenues, Financial Planning magazine, June 1996-2020

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