



Kayne Anderson Rudnick

Thomas Connaghan Ranked on Forbes “Best-in-State Wealth Advisors” List for California

Connaghan recognized under San Francisco’s ‘High Net Worth’ designation

LOS ANGELES – February 11, 2021– **Thomas Connaghan, Senior Wealth Advisor** for Kayne Anderson Rudnick Wealth Advisors, has ranked on *Forbes* “Best-in-State Wealth Advisors” list for 2021. Connaghan has ranked among California’s top wealth advisors on *Forbes* “Best-in-State Wealth Advisors” list for the second consecutive year.

For additional information on the ranking, visit: <https://www.forbes.com/best-in-state-wealth-advisors/#6434c433291d>.

"Tom’s customized, dynamic financial planning, and singular focus on building long-term relationships is evident and reflected in this honorable ranking," said **Stephen A. Rigali, Kayne Anderson Rudnick Executive Managing Director and Member of the Executive Management Committee**. "The KAR Executive Committee congratulates Tom Connaghan and his team on being recognized by *Forbes* as a top wealth advisor in San Francisco, California for the second straight year."

According to R.J. Shook, President of Shook Research, *Forbes* ranking of the top wealth advisors in America from wirehouses, independent broker-dealers and RIAs, is based on an algorithm of qualitative criteria, mostly gained through due diligence interviews, and quantitative data. SHOOK Research uses an algorithm which weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices and approach to working with clients.

Members of Kayne Anderson Rudnick’s wealth management team also appeared on *Forbes*’ 2021 list of the “America’s Top Wealth Advisors” and ranked first overall in *Barron’s* 2020 list of “Top 100 Independent Financial Advisors” list for the fourth consecutive year.

About Kayne Anderson Rudnick

Kayne Anderson Rudnick is an investment and wealth advisory firm founded in 1984 by John Anderson (a Forbes 400 billionaire and the benefactor of UCLA’s Anderson School of Management). Based in Los Angeles, the firm has \$61.2 billion in assets under management as of June 30, 2021. The company manages assets for corporations, endowments, foundations, public entities and high net worth individuals. With over 30 years of experience, the firm is known for its commitment to high quality in its business practices, investment strategies and wealth solutions.

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Forbes’ 2021 Top Wealth Advisors and Best-In-State Wealth Advisors: *Forbes* includes wirehouses along with RIAs in their ranking. The *Forbes* rankings, developed by SHOOK Research, are 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 have a minimum of seven years’ experience, and the algorithm 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. Each variable is graded and represents a certain value for each measured component. The algorithm that measures thousands of advisors against each other. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Neither *Forbes* nor SHOOK receive a fee in exchange for rankings. KAR has not paid a fee to participate in the rankings, but has paid fees for a license to reprint and distribute the results of the rankings.

For additional information on the *Forbes*’ 2021 Top Wealth Advisors ranking, please visit [here](#).

For additional information on the *Forbes*’ 2021 Best-In-State Wealth Advisors Ranking, please visit [here](#).