



FIVE STAR WEALTH MANAGERS

150 WEALTH MANAGERS YOU NEED TO KNOW

You work hard and want your money to work hard for you! You're likely seeking solid investments and financial strategies that fit your family and your situation. These days, finding the right wealth manager is an integral part of securing your financial freedom and well-being. But where should you turn to find the adviser who can start working for you?

Five Star Professional employed a rigorous research process to identify the Five Star award winners in cities across the United States. Award-winning professionals were carefully selected from among thousands of wealth managers for their knowledge, service and experience (see list and disclosure for full list of cities covered).

The winners represented here — under 150 outstanding wealth managers in total — are some of the country's most dedicated wealth managers and investment professionals, each committed to pursuing professional excellence and providing exceptional service to their clients.

Five Star Professional identified award candidates based on industry data and nominations received from industry firms and individuals (self-nominations are not accepted).

For the full list of Five Star award winners and an overview of the research methodology, visit fivestarprofessional.com.

RESEARCH DISCLOSURES

In order to consider a broad population of high-quality wealth managers and investment professionals, award candidates are identified by one of three sources: firm nomination, peer nomination or prequalification based on industry standing. Self-nominations are not accepted. Award candidates were identified using internal and external research data. Candidates do not pay a fee to be considered or placed on the final lists of Five Star Wealth Managers.

Although this list is a useful tool for anyone looking for help in managing their financial world or implementing new aspects into their financial strategies, it should not be considered exhaustive. Undoubtedly, there are many excellent professionals who, for one reason or another, are not on this year's lists.

- The Five Star awards are not indicative of a professional's future performance.
- Wealth managers may or may not use discretion in their practice and therefore may not manage their clients' assets.
- The inclusion of a professional on the Five Star Wealth Manager list should not be construed as an endorsement of the professional by Five Star Professional or Bloomberg.
- Working with a Five Star Wealth Manager or any professional is no guarantee as to future investment success, nor is there any guarantee that the selected professionals will be awarded this accomplishment by Five Star Professional in the future.
- Five Star Professional is not an advisory firm, and the content of this article should not be considered financial advice. For more information on the Five Star Wealth Manager award program, research and selection criteria, go to fivestarprofessional.com/public/research.

FIVE STAR WEALTH MANAGER CRITERIA

Award candidates who satisfied 10 objective eligibility and evaluation criteria were named 202X Five Star Wealth Managers. **Eligibility Criteria – Required:** 1. Credentialed as a registered investment adviser or a registered investment adviser representative. 2. Actively employed as a credentialed professional in the financial services industry for a minimum of five years. 3. Favorable regulatory and complaint history review. 4. Fulfilled their firm review based on internal firm standards. 5. Accepting new clients. **Evaluation Criteria – Considered:** 6. One-year client retention rate. 7. Five-year client retention rate. 8. Non-institutional discretionary and/or non-discretionary client assets administered. 9. Number of client households served. 10. Education and professional designations.

Regulatory Review: As defined by Five Star Professional, the wealth manager has not: been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; individually contributed to a financial settlement of a customer complaint; been convicted of a felony. Within the past 11 years the wealth manager has not: been terminated from a wealth management or financial services firm; filed for personal bankruptcy; had more than a total of three settled or pending complaints filed against them (and no more than five total pending, dismissed or denied) with any regulatory authority.

Five Star Professional conducts a regulatory review of each nominated wealth manager using the Investment Adviser Public Disclosure (IAPD) website. Five Star Professional also uses multiple supporting processes to help ensure that a favorable regulatory and complaint history exists. Data submitted through these processes was applied per the above criteria; each wealth manager who passes the Five Star Professional regulatory review must attest that they meet the definition of favorable regulatory history based upon the criteria listed above. Five Star Professional promotes via local advertising the opportunity for consumers to confidentially submit complaints regarding a wealth manager.



BLOOMBERG BOSTON FIVE STAR WEALTH MANAGER

As seen in Bloomberg, April 2025 issue

<p>Eric J. Brisebois · Vision Wealth Strategies, LLC · 617-762-0860</p>	<p>Philadelphia</p>
<p>Detroit</p>	<p>New Jersey</p>

Eric J. Brisebois · Vision Wealth Strategies, LLC · 617-762-0860

This award was issued on 02/01/2025 by Five Star Professional (FSP) for the time period 04/10/2024 through 10/31/2024. 4,671 Boston-area wealth managers were considered for the award; 528 (11 % of candidates) were named 2025 Five Star Wealth Managers.

Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. The award is based on 10 objective criteria. Eligibility criteria – required: 1. Credentialed as a registered investment adviser (RIA) or a registered investment adviser representative; 2. Actively licensed as a RIA or as a principal of a registered investment adviser firm for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by FSP, the wealth manager has not; A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three settled or pending complaints filed against them and/or a total of five settled, pending, dismissed or denied complaints with any regulatory authority or FSP’s consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through FSP’s consumer complaint process; feedback may not be representative of any one client’s experience; C. Individually contributed to a financial settlement of a customer complaint; D. Filed for personal bankruptcy within the past 11 years; E. Been terminated from a financial services firm within the past 11 years; F. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients. Evaluation criteria – considered: 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. FSP does not evaluate quality of services provided to clients. The award is not indicative of the wealth manager’s future performance. Wealth managers may or may not use discretion in their practice and therefore may not manage their clients’ assets. The inclusion of a wealth manager on the Five Star Wealth Manager list should not be construed as an endorsement of the wealth manager by FSP or this publication. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by FSP in the future. Visit www.fivestarprofessional.com.



FIVE STAR WEALTH MANAGERS YOU NEED TO KNOW

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Five Star Professional employed a rigorous research process to identify the Five Star award winners in cities across the United States. Award-winning professionals were carefully selected from among thousands of wealth managers for their knowledge, service and experience (see list and disclosure for full list of cities covered).

Winners featured here represent some of the country's most dedicated wealth managers and investment professionals, each committed to pursuing professional excellence and providing exceptional service to their clients.

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For the full list of Five Star award winners and an overview of the research methodology, visit fivestarprofessional.com

RESEARCH DISCLOSURES

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Although this list is a useful tool for anyone looking for help in managing their financial world or implementing new aspects into their financial strategies, it should not be considered exhaustive. Undoubtedly, there are many excellent professionals who, for one reason or another, are not on this year's lists.

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- Wealth managers and investment professionals may or may not use discretion in their practice and therefore may not manage their clients' assets.
- The inclusion of a professional on the Five Star Wealth Manager list should not be construed as an endorsement of the professional by Five Star Professional or Fortune.
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FIVE STAR WEALTH MANAGER CRITERIA

Award candidates who satisfied 10 objective eligibility and evaluation criteria were named Five Star Wealth Managers. **Eligibility Criteria – Required:** 1. Credentialed as a registered investment adviser or a registered investment adviser representative. 2. Actively employed as a credentialed professional in the financial services industry for a minimum of five years. 3. Favorable regulatory and complaint history review. 4. Fulfilled their firm review based on internal firm standards. 5. Accepting new clients. **Evaluation Criteria – Considered:** 6. One-year client retention rate. 7. Five-year client retention rate. 8. Non-institutional discretionary and/or non-discretionary client assets administered. 9. Number of client households served. 10. Education and professional designations.

Regulatory Review: As defined by Five Star Professional, the wealth manager has not: Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine. Individually contributed to a financial settlement of a customer complaint. Been convicted of a felony. Within the past 11 years: Been terminated from a wealth management or financial services firm; filed for personal bankruptcy; had more than a total of three settled or pending complaints filed against them (and no more than five total pending, dismissed, or denied) with any regulatory authority.

Five Star Professional conducts a regulatory review of each nominated wealth manager using the Investment Adviser Public Disclosure (IAPD) website. Five Star Professional also uses multiple supporting processes to help ensure that a favorable regulatory and complaint history exists. Data submitted through these processes was applied per the above criteria: Each wealth manager who passes the Five Star Professional regulatory review must attest that they meet the definition of favorable regulatory history, based upon the criteria listed above. Five Star Professional promotes via local advertising the opportunity for consumers to confidentially submit complaints regarding a wealth manager.



FORTUNE BOSTON FIVE STAR WEALTH MANAGER

As seen in Fortune, June/July 2025 issue

Eric J. Brisebois · Vision Wealth Strategies, LLC · 617-762-0860

Eric J. Brisebois · Vision Wealth Strategies, LLC · 617-762-0860

This award was issued on 02/01/2025 by Five Star Professional (FSP) for the time period 04/10/2024 through 10/31/2024. Fee paid for use of marketing materials. Self-completed questionnaire was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria. 4,671 Boston-area wealth managers were considered for the award; 528 (11% of candidates) were named 2025 Five Star Wealth Managers.

Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. The award is based on 10 objective criteria. Eligibility criteria – required: 1. Credentialed as a registered investment adviser (RIA) or a registered investment adviser representative; 2. Actively licensed as a RIA or as a principal of a registered investment adviser firm for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by FSP, the wealth manager has not; A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three settled or pending complaints filed against them and/or a total of five settled, pending, dismissed or denied complaints with any regulatory authority or FSP’s consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through FSP’s consumer complaint process; feedback may not be representative of any one client’s experience; C. Individually contributed to a financial settlement of a customer complaint; D. Filed for personal bankruptcy within the past 11 years; E. Been terminated from a financial services firm within the past 11 years; F. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients. Evaluation criteria – considered: 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. FSP does not evaluate quality of services provided to clients. The award is not indicative of the wealth manager’s future performance. Wealth managers may or may not use discretion in their practice and therefore may not manage their clients’ assets. The inclusion of a wealth manager on the Five Star Wealth Manager list should not be construed as an endorsement of the wealth manager by FSP or this publication. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by FSP in the future. Visit www.fivestarprofessional.com.

The Wall Street Journal

FIVE STAR AWARD WINNERS

— YOU NEED TO KNOW —



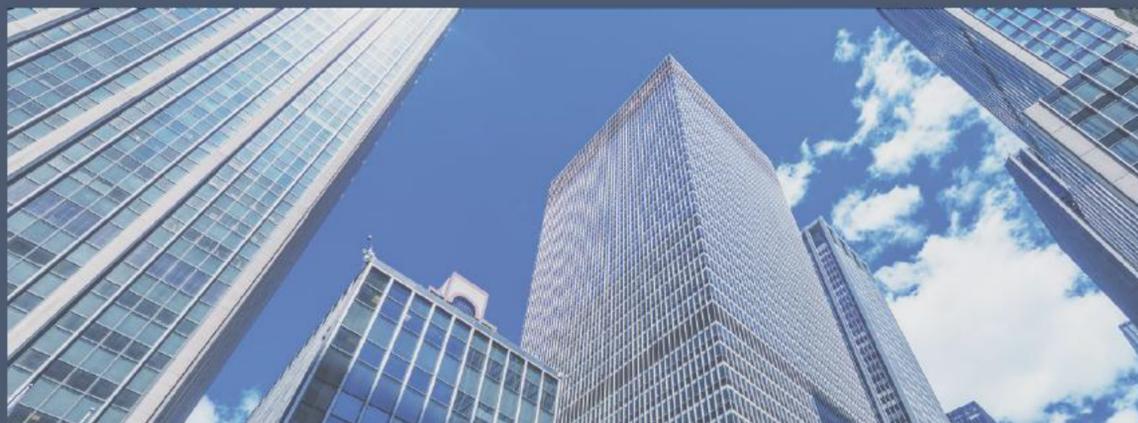
You work hard and want your money to work hard for you with solid investments and financial strategies that fit your family and your situation. These days, finding the right professional is an integral part of one's financial freedom and well-being. But where should you turn to find the advisor who can start

working for you?

Five Star Professional employed a rigorous research process to identify the Five Star Wealth Manager and Five Star Investment Professional award winners in the Boston area. Award-winning professionals were carefully selected from among thousands of wealth managers for their knowledge, service and experience.

Winners featured here represent some of Boston's most dedicated professionals, each committed to pursuing professional excellence and providing exceptional service to their clients.

Five Star Professional identified award candidates based on industry data and nominations received from industry firms and individuals in Boston (self-nominations are not accepted). Only candidates who satisfied 10 objective eligibility and evaluation criteria have been named Five Star Wealth Managers and Five Star Investment Professionals. The full lists of Boston Five Star Wealth Managers and Five Star Investment Professionals can be found online at [fivestarprofessional.com](https://www.fivestarprofessional.com). For an overview of the research methodology, visit [fivestarprofessional.com](https://www.fivestarprofessional.com).



Meet these Boston
award winners

About Our Research

FIVE STAR WEALTH MANAGER CRITERIA

Determination of Award Winners

Award candidates who satisfied 10 objective eligibility and evaluation criteria were named 2024 Five Star Wealth Managers.

Eligibility Criteria - Required:

1. Credentialed as a registered investment adviser or a registered investment adviser representative.
2. Actively employed as a credentialed professional in the financial services industry for a minimum of five years.
3. Favorable regulatory and complaint history review.
4. Fulfilled their firm review based on internal firm standards.
5. Accepting new clients.

Evaluation Criteria - Considered:

6. One-year client retention rate.
7. Five-year client retention rate.
8. Non-institutional discretionary and/or non-discretionary client assets administered.
9. Number of client households served.
10. Education and professional designations.

4,421 award candidates in the Boston area were considered for the Five Star Wealth Manager award. 580 (approximately 13% of the award candidates) were named 2024 Five Star Wealth Managers.

FIVE STAR INVESTMENT PROFESSIONAL CRITERIA

Determination of Award Winners Criteria

The investment professional award goes to estate planning attorneys, insurance agents and select others in the financial industry.

Eligibility Criteria - Required:

1. Credentialed with appropriate state or industry licensures.
2. Actively employed as a credentialed professional in the financial services industry for a minimum of five years.
3. Favorable regulatory and complaint history review.
4. Accepting new clients.

Evaluation Criteria - Considered:

5. One-year client retention rate.
6. Five-year client retention rate.
7. Number of client households served.
8. Recent personal production and performance (industry specific criteria).
9. Education and professional designations/ industry and board certifications.
10. Pro Bono and community service work.

This year, we honored 15 Boston-area investment professionals with the Five Star Investment Professional award.

The Wall Street Journal

BOSTON FIVE STAR WEALTH MANAGER

Francis/Weaver: First Wealth/Inc. 617-579-2815

David/Weir: Strategic Wealth Management
- 214-229-2162

Garrett/Werner: Digital Investments

**Eric Brisebois · Vision Wealth Strategies, LLC ·
617-762-0860**

Paul/Bell: SouthWest 214-229-2162

Robert/Baker: Daily 214-229-2162

David/Bertram: FullCircle

Allen/Bayer: Equity Search

James/Bush: Boston Wealth 385-395-9817

Ellie Brown: Platinum Wealth Management
- 206-427-8888

Natalie/Caffrey: South Wealth 617-862-5626

Miguel/Chavez: FullCircle Advisors 479-452-9638

Carissa/Cogger: RealPerformance Wealth
- 214-289-7816

Angela/Cover: Wealth Nation 214-289-1331

Revy/Conger: Smith and Associates 575-388-1875

David/Conger: Strategy of Wealth 321-283-9688

Clayton/Crossman: Smith and Associates
- 525-276-9455

Shawna/Darling: Continuity Advisors
- 617-547-4688

David/Dalton: Boston Wealth 362-225-8823

Harriet/Deger: Diamond Financial
- 206-466-2236

Joan/Delaney: Platinum Wealth Management
- 206-427-8888

Geoff/Dunbar: Parsons and Associates
- 603-221-9892

Michael/Edwards: Strategic Wealth Management
- 603-428-1831

James/Fair: HighClass Financial 462-452-9837

Alan/Ford: Prudent Financial 765-859-2412

David/Fox: Continuity Advisors 412-262-9412

Rob/Galpin: FullCircle Advisors 363-222-5747

Henry/German: Continuity Advisors 267-357-3349

Christa/Gleason: Daily 419-382-1476

Revy/Gold: Oak Tree Financial 206-466-2236

Joan/Green: FullCircle Advisors 617-428-9437

Arthur/Grossman: HighClass Financial
- 363-226-6713

Edwards/Hagerman: HighClass Financial
- 321-948-6716

**Eric Brisebois · Vision Wealth Strategies, LLC ·
617-762-0860**



Award winner advertised in
The Wall Street Journal

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2025



FIVE STAR WEALTH MANAGER

Eric J. Brisebois

President/Owner

2015 • 2018 • 2019 • 2020 • 2021 • 2022 • 2023 • 2024 • 2025