

## FIVE STAR DISCLOSURE

Trinity Financial Advisers, LLC received The FIVE STAR Wealth Manager Award in the Wealth Management Category. It is important to note that thousands of advisors are considered for the award and historically less than 10 percent received the award in any one of 45 major markets. Crescendo Business Services (Crescendo) created and conducted the survey.

Consideration for inclusion in The FIVE STAR Wealth Manager Award program is based on an evaluation that considers one-year client retention rate, five-year client retention rate, non-institutional discretionary and/or non-discretionary client assets administered, number of client households served and education and professional designations. Only wealth managers with five years of experience in the financial services industry are considered. Additionally, the wealth managers who have made the list must qualify as having a favorable regulatory and compliant history review. To qualify as having a favorable regulatory and compliant history for this award, the wealth manager cannot have (1) been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine, (2) had more than a total of three customer complaints filed against them (settled or pending) with any regulatory authority or Five Star Professional's consumer compliant process, (3) individually contributed to a financial settlement of a customer complaint filed with a regulatory authority, (4) filed for bankruptcy, or (5) been convicted of a felony.

The inclusion of a wealth manager on The FIVE STAR Wealth Manager Award list should not be construed as an endorsement of the wealth manager by Crescendo nor should it be inferred that the responses used from the survey represent the experience of any clients. This award does not evaluate the quality of service provided and the wealth manager may have had unfavorable ratings. The rating is not indicative of the wealth manager's future performance. Additionally, while a recipient of the award is not compelled to pay Crescendo for consideration or to receive the award, the recipient may have to compensate Crescendo for the use of their proprietary material. Crescendo is a for-profit entity.