



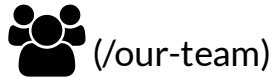
An Independent Firm

(/)

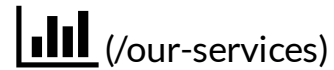
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Ernie George was among the advisors named to the Forbes list of Best-In-State Wealth Advisors. This list, which recognizes advisors from national, regional and independent firms, was released online February 20, 2019.

The Forbes ranking of Best-In-State Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone 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 practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receives a fee in exchange for rankings. This ranking is not indicative of advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Financial Advisors or RIA firms do not pay a fee in exchange for this award/rating.

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Dimensional: Importance of Advice

02:11



Goal Planning and Monitoring



Latest Blog Posts

Are My Social Security Benefits Taxable? (/blog/are-my-social-security-benefits-taxable)

The quick answer is “it depends.” But, for the 33 percent of retirees who now rely more heavily on their Social Security benefits to sustain their lifestyle, the answer takes on even more significance. Generally, your income from Social Security is not taxable on its own; but when it’s combined with other sources of income for tax reporting purposes, a portion of your Social Security benefits, up to 85 percent, could be includable as taxable income. Unfortunately, over 40 percent of retirees aren’t aware that their benefits could possibly be taxed, and it is always a rude awakening when it happens.

[Read more \(/blog/are-my-social-security-benefits-taxable\)](/blog/are-my-social-security-benefits-taxable)

Credit Card Fraud Detection and Protection Basics (/blog/credit-card-fraud-detection-and-protection-basics)

It’s happening with increasing frequency – people who finally get around to checking their credit card statements see an unusual charge or go to charge a purchase only to find out their credit card is maxed out when they have hardly used it. Credit card fraud is a \$200 billion a year business affecting more than 10 percent of households. That means there is a one in ten chance that you can be a victim of credit card fraud. But, if you know the credit card fraud detection and protection basics, your chances go way down.

[Read more \(/blog/credit-card-fraud-detection-and-protection-basics\)](/blog/credit-card-fraud-detection-and-protection-basics)

Financial Decisions Made Easy with Clearly-Defined Goals (/blog/financial-decisions-made-easy-clearly-defined-goals)

One of the best illustrated instances of indecision occurs in the story of Alice in Wonderland in which Alice comes to a fork in the road and must choose a path to continue her journey. She seeks the advice of grinning Cheshire cat which appears out of nowhere. “Where are you headed?” the

cat asks Alice, to which she replied, “I don’t know.” “Well,” the cat smugly responds, “then it really doesn’t matter.”

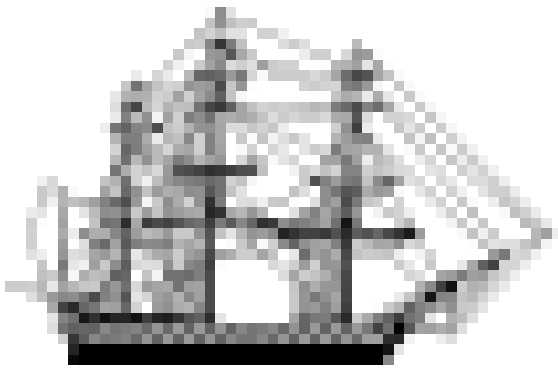
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