

It's time you get to know RegentAtlantic



RegentAtlantic named to *Barron's 2021 list of America's Top RIA Firms*



FA Magazine Lists RegentAtlantic as *Top Ranking RIA in 2021*



RegentAtlantic recognized by *NJBIZ as one of the Best Places to Work in New Jersey for 2021*
Named for the 11th consecutive year



RegentAtlantic named to *NJ.com & Jersey's Best Top Workplaces in 2021*



Barbara Bilello named to *Crain's New York Business 2021 Notable LGBTQ Leaders & Executives*



Jane Newton named to *Crain's New York Business 2021 Notable Women on Wall Street*



RegentAtlantic named to *Barron's 2020 list of America's Top RIA Firms*



Abby Rosen named *New Jersey Psychological Association's Citizen of the Year*



RegentAtlantic recognized by *The Financial Times as one of the top 300 Independent Registered Investment Advisers of 2020*



Barbara Bilello named to *Crain's New York Business 2020 Notable LGBTQ Leaders & Executives*

We're proud to share our most recent recognitions. We invite you to browse our Recognitions page at regentatlantic.com for a full history of individual and firm awards.

Important Disclosure Information for the Previous Page:

- 1. RegentAtlantic named to Barron's 2021 list of America's Top RIA Firms** - Participation in Barron's Top 100 RIA Firms ranking is by invitation only and limited to firms that meet the minimum eligibility requirements. As with all Barron's rankings, Barron's does not disclose the proprietary formula. Some general guidance on Barron's methodology: Participating firms were evaluated and ranked on a wide range of quantitative and qualitative data, including: assets overseen by the firm, revenue generated by the firm, level of technology spending, number of clients, size of staff, diversity across staff, and placement of a succession plan. The number of firms invited to participate in 2021 was not disclosed by Barron's nor were the number of firms that meet the legibility requirements. The ranking is not indicative of the RegentAtlantic's past or future performance. Neither the Firm nor its executives pay a fee to Barron's in exchange for the ranking. Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved.
- 2. FA Magazine** - RegentAtlantic did not pay a fee to FA Magazine in exchange for inclusion in the FA Magazine's Annual RIA Ranking. Please note that this is not an indication of any client's experience with RegentAtlantic, nor is this an indication of RegentAtlantic's future performance.
- 3. NUBIZ Best Places to Work** - The number of organizations that registered for the awards program was not disclosed by the Best Companies Group. RegentAtlantic did pay a fee to NUBIZ in exchange for inclusion in the NUBIZ Best Places to Work in New Jersey. Please note that this is not an indication of any client's experience with RegentAtlantic. Nor is this an indication of RegentAtlantic's future performance.
- 4. NJ.com & Jersey's Best Top Workplaces, 2021** - There were 45 companies who submitted nominations for the small business category (50-149 employees) and were ranked based on criteria selection. RegentAtlantic did pay a fee to NJ.com in exchange for inclusion in the Top Workplaces in New Jersey for 2021. Please note that this is not an indication of any client's experience with RegentAtlantic. Nor is this an indication of RegentAtlantic's future performance.
- 5. Crain's New York Business 2021 Notable LGBTQ Leaders & Executives** - To find the honorees, Crain's consulted with trusted sources in the LGBTQ and general business communities. At the same time, Crain's carefully vetted the nominations submitted by fi-rms or individuals headquartered in the metropolitan area or having a major influence or presence there. Ultimately the LGBTQ leaders and executives were selected for their career accomplishments, their mentorship of others, and their involvement in community and industry organizations. Investment performance isn't an explicit component because not all advisors have audited results and because performance figures often are influenced more by clients' risk tolerance than by an advisor's investment-picking abilities. Crain's does not disclose the number of participants who entered for this award. The Crain's award may not be representative of any of Barbara Bilello's or RegentAtlantic's clients' experience with Barbara or the firm or any future experience with Barbara or the firm. The Crain's award is not indicative of Barbara Bilello's or RegentAtlantic's future investment performance. The award is meant as a starting point for clients looking for an advisor—a first-pass vetting that can help investors narrow a search. Every advisor will have his or her own approach to investing, financial planning and other services. Clients are encouraged to approach a search for an advisor the way they would a search for a doctor—interviewing multiple professionals and getting opinions from multiple third parties. Please note that there is no fee to participate in the selection.
- 6. Crain's New York Business 2021 Notable Women on Wall Street** - The criteria for nomination and selection process included five core components: Any woman currently working in New York in the financial sector such as banks, investment firms, insurance companies, mutual funds, hedge funds, private equity funds and stock exchanges; company affiliation based within the 5 boroughs of New York City or the counties of Westchester, Bergen, Nassau or Rockland; working for a minimum of 5 years in the industry; career professional achievements with an emphasis on the past 12 to 18 months; and involvement in community and/or philanthropic activities, mentoring programs, diversity & inclusion initiatives. Investment performance isn't an explicit component because not all advisors have audited results and because performance figures often are influenced more by clients' risk tolerance than by an advisor's investment-picking abilities. The Crain's award may not be representative of any of Jane Newton's or RegentAtlantic's clients' experience with Jane or the Firm or any future experience with Jane or the firm. The Crain's award is not indicative of Jane Newton's or RegentAtlantic's future investment performance. The award is meant as a starting point for clients looking for an advisor—a first-pass vetting that can help investors narrow a search. Every advisor will have his or her own approach to investing, financial planning and other services. Clients are encouraged to approach a search for an advisor the way they would a search for a doctor—interviewing multiple professionals and getting opinions from multiple third parties. Please note that there is no fee to participate in the selection.
- 7. Barron's 2020 list of America's Best RIA Firms** - Participation in Barron's Top 100 RIA Firms ranking is by invitation only and limited to firms that meet the minimum eligibility requirements. As with all Barron's rankings, Barron's does not disclose the proprietary formula. Some general guidance on Barron's methodology: Participating firms were evaluated and ranked on a wide range of quantitative and qualitative data, including: assets overseen by the firm, revenue generated by the firm, level of technology spending, number of clients, size of staff, diversity across staff, and placement of a succession plan. The number of firms invited to participate in 2020 was not disclosed by Barron's nor were the number of firms that meet the legibility requirements. The ranking is not indicative of the RegentAtlantic's past or future performance. Neither the Firm nor its executives pay a fee to Barron's in exchange for the ranking. Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved.
- 8. New Jersey Psychological Association's Citizen of the Year** - The Citizen of the Year Award is awarded to a non-psychologist who has made significant contributions to the ideals of mental health or social welfare. Recipients were selected by the NJPA Executive Board based upon how well they meet the criteria of the award. Nominees are nominated by members of the organization and nominations consist of several paragraphs detailing why this individual deserves the honor and the CV of the nominee. Supporting documentation may also be enclosed. Ms. Rosen did not pay a fee to be nominated and that this award is not reflective of her clients experience at RegentAtlantic.
- 9. The Financial Times as one of the top 300 Independent Registered Investment Advisers of 2020** - The Financial Times 300 Top Registered Investment Advisers is an independent listing produced annually by Ignites Research, a division of Money-Media, Inc., on behalf of the *Financial Times* (July 2020). The FT 300 is based on data gathered from RIA firms, regulatory disclosures, and the FT's research. The listing reflected each practice's performance in six primary areas: assets under management, asset growth, compliance record, years in existence, credentials and online accessibility. Over 750 qualified firms applied for the award, twenty (20) of which have offices in New Jersey, and 300 were selected (40%). This award does not evaluate the quality of services provided to clients and is not indicative of the practice's future performance. Neither the RIA firms nor their employees pay a fee to *The Financial Times* in exchange for inclusion in the FT 300.
- 10. Crain's New York Business 2020 Notable LGBTQ Leaders & Executives** - To find the honorees, Crain's consulted with trusted sources in the LGBTQ and general business communities. At the same time, Crain's carefully vetted the nominations submitted by fi-rms or individuals headquartered in the metropolitan area or having a major influence or presence there. Ultimately the LGBTQ leaders and executives were selected for their career accomplishments, their mentorship of others, and their involvement in community and industry organizations. Investment performance isn't an explicit component because not all advisors have audited results and because performance figures often are influenced more by clients' risk tolerance than by an advisor's investment-picking abilities. The Crain's award may not be representative of any of Barbara Bilello's or RegentAtlantic's clients' experience with Barbara or the firm or any future experience with Barbara or the firm. The Crain's award is not indicative of Barbara Bilello's or RegentAtlantic's future investment performance. The award is meant as a starting point for clients looking for an advisor—a first-pass vetting that can help investors narrow a search. Every advisor will have his or her own approach to investing, financial planning and other services. Clients are encouraged to approach a search for an advisor the way they would a search for a doctor—interviewing multiple professionals and getting opinions from multiple third parties. Please note that there is no fee to participate in the selection.