Nine Southwestern Investment Group Advisors Named to Forbes' 2022 List of Best-In-State Wealth Advisors

FRANKLIN, Tenn., April 18, 2022 (SEND2PRESS NEWSWIRE) — Jeffrey T. Dobyns, President, Bob Sircy, Jr., Senior Executive Vice President, Luke Aull, Senior Executive Vice President, Mark Deering, Senior Executive Vice President, Tommy Doerfler, Senior Executive Vice President, John Nail, Senior Executive Vice President, Tyler Nace, Executive Vice President, Matt Atchison, Executive Vice President, and Michael Purifoy, Senior Executive Vice President, all of Southwestern Investment Group headquartered at 801 Crescent Centre Drive, Franklin, TN were among the Raymond James-affiliated advisors named to the Forbes list of Best-In-State Wealth Advisors. The 2022 list, which recognizes advisors from national, regional, and independent firms, was released online April 7, 2022.

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.

Southwestern Investment Group is a family of advisors who all follow the same guidelines and core values to put the client first. The company's overall objective is to design sensible financial plans that help to build and preserve money in a way that aligns with clients' overall well-being and goals for their financial futures. With a holistic approach to financial advising, the Southwestern Investment Group network empowers clients to take control of their finances and help achieve their dreams.

To reach the advisors at Southwestern Investment Group, more information can be found at https://www.swinvestmentgroup.com/ or by calling 615-861-6100.

About Forbes ranking of Best-In-State Wealth Advisors

Data provided by SHOOK™ Research, LLC.

Source: Forbes.com (April, 2022). 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. Out of approximately 34,925 nominations received, based on thresholds, more than 6,500 advisors received the award. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Raymond James is not affiliated with Forbes or Shook Research, LLC. Please visit https://www.forbes.com/best-in-state-wealth-advisors for more info.

About Southwestern Investment Group

As of 3/31/2022. Southwestern Investment Group was established in 2002 as an independent practice and manages more than $5.8 billion in client assets. The advisors at Southwestern Investment Group are registered representatives with Raymond James Financial Services, a wholly-owned subsidiary of Raymond James Financial, which allows them to have the support of a large company while offering the personalized services of a small organization. Southwestern Investment Group uses sensible, sound, and conservative investment strategies and holistic services to enhance and help preserve your wealth. For more information, visit https://www.swinvestmentgroup.com/.

About Raymond James Financial Services

As of 3/31/2022. Raymond James Financial Services, Inc. is a financial services firm supporting independent financial advisors nationwide. Since 1974, Raymond James Financial Services Inc., member FINRA/SIPC, has provided a wide range of investment and wealth planning related services through its affiliate, Raymond James & Associates, Inc., member New York Stock Exchange/SIPC. Both broker/dealers are wholly owned subsidiaries of Raymond James Financial, Inc. (NYSE-RJF) a leading diversified financial services company with approximately 8,500 financial advisors throughout the United States, Canada and overseas. Total client assets are $1.26 trillion. Additional information is available at https://www.raymondjames.com/.

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