



2010 • 2011



DENVER 2011 FIVE STAR WEALTH MANAGERS ANNOUNCED

Denver, CO (November 2011) - For the second year in a row, Staib Financial Planning, LLC principal, Paul Staib is among 7% of wealth managers in the Denver area to be named a 2011 FIVE STAR Best in Overall Satisfaction Wealth Manager.

THE SELECTION PROCESS

In the November issues of 5280 magazine and ColoradoBiz magazine, the Denver 2011 FIVE STAR: Best in Overall Satisfaction Wealth Managers (SM) are announced. 5280 magazine and ColoradoBiz magazine formed a partnership with Crescendo Business Services, an independent research firm, to identify the "best in overall satisfaction" wealth managers serving the Denver area. Crescendo surveyed by mail and phone over 109,000 high-net-worth residents in the Denver area and over 10,400 financial services professionals.

On the surveys, recipients were asked to select only wealth managers whom they knew through personal experience, and to evaluate them based upon nine criteria: customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting of financial objectives, post-sale service, quality of recommendations and overall satisfaction.

Both positive and negative evaluations were included in the scoring and only wealth managers with more than five years of experience in the financial services industry were considered.

Next, each wealth manager was reviewed for regulatory actions, civil judicial actions and customer complaints as reported by FINRA (the Financial Industry Regulatory Authority), the SEC, and other regulatory agencies.

Then, before finalizing the list, wealth managers were reviewed by a blue ribbon panel comprised of knowledgeable individuals from within the financial services industry. Although panelist comments were incorporated into the final score, safeguards were built into the review process to reduce the ability of panel members to influence the composition of the final list on the basis of company affiliation.

AN ELITE AWARD

The resulting list of 2011 FIVE STAR Wealth Managers is an elite group, representing less than 7 percent of the wealth managers in the Denver area. Only 568 of the top-scoring wealth managers made this year's list.

RESEARCH DECLARATIONS

As with any research or recognition program, it is important that we provide you the following declarations:

- The 2011 FIVE STAR: Wealth Managers do not pay a fee to be included in the research or the final list of FIVE STAR: Best in Overall Satisfaction Wealth Managers.
- The overall evaluation score of a wealth manager reflects an average of all respondents and may not be representative of any one client's evaluation.
- The FIVE STAR 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 client's 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 Crescendo Business Services, 5280 magazine or ColoradoBiz magazine.
- 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 Crescendo in the future.
- The research process for the FIVE STAR: Best in Overall Satisfaction Wealth Manager Program, managed by Quantitative Market Intelligence (QMI), incorporates a statistically valid sample in order to identify the wealth managers in the local market that score highest in client satisfaction. QMI does not include wealth managers on the list unless their score is statistically valid. At least fifty percent of the wealth managers in the market have a statistically valid score.

FIVE STAR Marketing and Sales Team
Crescendo Business Services

ABOUT STAIB FINANCIAL PLANNING, LLC. Staib Financial Planning, LLC is an independent Colorado financial services firm, specializing in providing comprehensive fee-only financial planning, investment management, and wealth management services to the Highlands Ranch, Lone Tree, Centennial, Littleton, Parker, Aurora, Denver and surrounding communities.

To learn more about Staib Financial Planning, LLC, please contact Paul Staib, Certified Financial Planner (CFP®), MBA at 303.346.5336 or www.StaibFinancialPlanning.com.