Important Disclosures:

The sole criteria for being chosen for this award was anonymous votes from Certified Financial Planners™ who are members of the DFW Financial Planning Association who answered the question of who they believe to be the most skilled and experienced financial planners and wealth managers in the industry.

The Firm paid no fees for participation in this award or any award contests, nor for being chosen as a winner. The Firm did choose to pay a fee to place an ad in the publication to advertise the fact they have been selected for this award.

This award was independently granted by D Magazine.

Client voting or input (positive or negative) was not used in this survey and therefore had no bearing on these results. This award was strictly based on peer voting.

Neither BentOak Capital nor LPL Financial has any affiliation or relationship, formal or informal, with D Magazine.

D Magazine is solely responsible for checking the statistical validation of the survey results.

BentOak Capital is aware of no facts, issues, or events that would call into question the validity of receiving this award.

The advertisement of this award is not intended to reflect any promise or prediction of future performance of Financial Planning services rendered to clients.

From D Magazine on criteria for top Wealth Manager Selection 2021

How we compiled this list:

We asked every wealth management firm and team in the Dallas-Fort Worth chapter of the Financial Planning Association, Chartered Financial Analyst Institute, and the Investments and Wealth Institute to tell us about their practices. The final list was selected based on these criteria: top firms or teams must have total assets under management for individual clients of at least $100 million; average assets under management per client of at least $1 million; a 95 percent client-retention rate over the last two years; and no current disciplinary actions. Additionally, all firms (or teams, should the team apply as an entity separate from its parent company) must have been in existence for at least five years as of the application deadline (June 7, 2021). They must also hold themselves out as fiduciaries for their clients and provide them with a written disclosure. A panel of esteemed local wealth managers reviewed the final list. All numbers are current as of the application deadline. Out of the 58 that applied, 36 firms and teams were selected.

From D Magazine on criteria for top Financial Planner 2021

D Magazine asked every Certified Financial Planner in the Dallas-Fort Worth chapter of the Financial Planning Association to cast an online ballot. They were asked to name peers, both inside and outside their firms, whom they considered to be the most skilled and experienced financial planners in the industry. Outside-firm votes counted more than inside-firm votes. Self-nominations were tossed out. A panel of esteemed local financial planners reviewed the list. Only CFPs made the list. A total of 718 votes were cast, and 240 individuals were nominated. Of these, 96 were selected.