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Financial Counseling, Inc.

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Atlanta's 2009 FIVE STAR Wealth Managers Announced

Atlanta, GA (October 2, 2009) – **Joseph (Joe) R. Rollins** and **Robert (Robby) E. Schultz, III** have been named as **2009 FIVE STAR Wealth Managers** by *Atlanta Magazine* and Crescendo Business Services in the October 2009 edition of the magazine. The individuals who receive this award are selected based on a rigorous research process and represent less than 4% of Wealth Managers in the Atlanta area.

The Problem - Well over half of the consumer responses in the Atlanta area indicated it is difficult to find a wealth manager they trust and rely on (2009 Consumer Survey, Quantitative Market Intelligence).

With more than 15,000 wealth managers in the Atlanta area, how do you find someone who listens to you, represents your interests and operates with an emphasis on integrity and service? *Atlanta Magazine* wanted to help. The magazine formed a partnership with Crescendo Business Services, an independent research firm, to find out which wealth managers successfully satisfied key client satisfaction criteria and overall scored the highest in client satisfaction.

The Selection Process - In February 2009, Crescendo surveyed, by mail and phone 70,000 high-net-worth residents in the Atlanta area and subscribers of *Atlanta Magazine*. An additional 6,500 surveys were sent to financial services industry 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. Only original surveys – no copies – returned in their specially designed envelopes were accepted as valid.

By March, stacks of surveys had arrived and Crescendo began carefully scoring each wealth manager. Both positive and negative evaluations were included in the scoring. Only wealth managers with 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) and other regulatory agencies.

Then, before finalizing the list, wealth managers were reviewed by a blue-ribbon panel. The blue-ribbon panel was comprised of 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.

The resulting list of 2009 FIVE STAR Wealth Managers is an elite group, representing less than 4 percent of the wealth managers in the Atlanta area. Only 579 of the top-scoring wealth managers made this year's list. Although this list will certainly be a useful tool for anyone looking for help in managing their financial world, it should not be considered exhaustive. Undoubtedly, there are many other excellent wealth managers who, for one reason or another, are not on this year's list.

RESEARCH DECLARATIONS:

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

- **The 2009 FIVE STAR Wealth Managers do not pay a fee to be included in the research or the final list of FIVE STAR: Best in Client 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 or *Atlanta 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 Client Satisfaction Wealth Manager Program, managed by Quantitative Market Intelligence (QMI), incorporates a statistically valid sample in order to identify 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.
- For more information on the FIVE STAR Award and the research/selection methodology, go to: www.fivestarprofessional.com/wmresearch.

About Rollins Financial Counseling, Inc.

Rollins Financial Counseling, Inc. is a SEC registered investment advisory firm that was established in Atlanta, Georgia in 1990 by Joseph (Joe) R. Rollins. Joe along with partners Robert (Robby) E. Schultz, III and Edward (Eddie) J. Wilcox offer independent investment management services for individuals, small businesses and corporations.

Rollins Financial employs various investment strategies depending on the specific objectives of each client. Our independence ensures that we are able to provide the most objective investment advice since we receive no compensation from any third parties.

Please visit www.rollinsfinancial.com to find out how Rollins Financial can become your partner to help you ***Plan for your tomorrow, today.***