



ADAM D. PREWETT, AIF[®], CRPC[®] OF LEVEL FOUR[®] WEALTH MANAGEMENT WINS FIVE STAR WEALTH MANAGER AWARD FOR 2016

PLANO, TX – September 15, 2016 – Five Star Professional is pleased to announce Adam D. Prewett of Level Four[®] Wealth Management, has been chosen as one of Dallas/Fort Worth’s Five Star Wealth Managers for 2016.

Five Star Professional partnered with Texas Monthly to recognize a select group of Dallas/Fort Worth-area wealth managers who provide quality services to their clients. Adam Prewett is featured, along with other award winners, in a special section of the August issue.

“We are a wealth management firm that guides individuals, families, business owners, and corporations on the journey to optimizing their financial strengths. We strive to develop innovative solutions that address our clients’ challenges and enhance their financial success,” says Adam Prewett of Level Four Wealth Management.

The Five Star Wealth Manager award program is the largest and most widely published wealth manager award program in North America. The award is based on a rigorous, multifaceted research methodology, which incorporates input from peers and firm leaders along with client retention rates, industry experience and a thorough regulatory history review.

“The research behind this award is extensive with each wealth manager being thoroughly vetted from numerous angles. We are proud to showcase these distinguished professionals,” stated Jonathan Wesser, Research Director, Five Star Professional.

The Five Star Wealth Manager award, administered by Crescendo Business Services, LLC (dba Five Star Professional), is based on 10 objective criteria: 1. Credentialed as a registered investment adviser or a registered investment adviser representative; 2. Active as a credentialed professional in the financial services industry for a minimum of 5 years; 3. Favorable regulatory and complaint history review (unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through Five Star Professional’s consumer complaint process*); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients; 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations.

Wealth managers do not pay a fee to be considered or awarded. Once awarded, wealth managers may purchase additional profile ad space or promotional products. The award methodology does not evaluate the quality of services provided and is not indicative of the winner’s future performance. 2,471 Dallas/Fort Worth wealth managers were considered for the award; 678 (28 percent of candidates) were named 2016 Five Star Wealth Managers.

*To qualify as having a favorable regulatory and complaint history, the person cannot have: 1. been subject to a regulatory action that resulted in a suspended or revoked license, or payment of a fine, 2. had more than three customer complaints filed against them (settled or pending) with any regulatory authority or Five Star Professional’s consumer complaint process, 3. individually contributed to a financial settlement of a customer complaint filed with a regulatory authority, 4. filed for bankruptcy, or 5. been convicted of a felony.

To learn more about Adam Prewett and Level Four Wealth Management, visit www.levelfouradvisors.com.