

Casey D. Waits of Waits Financial Group Appears in Texas Monthly as a Five Star Wealth Manager for 2015

Five Star Professional has awarded him for his service, experience and expertise.

Dallas, TX – Five Star Professional is pleased to announce Casey D. Waits, Waits Financial Group, has been chosen as one of Dallas' Five Star Wealth Managers for 2015.

Five Star Professional partnered with Dallas Magazine to recognize a select group of Dallas-area wealth managers who provide quality services to their clients. Casey D. Waits will be featured, along with other award winners, in a special section of the August issue.

“I am honored to be selected, again, as a Five Star Wealth Manager and to be included with such an esteemed group of professionals. For the past 20 years, I have enjoyed developing long term relationships with individuals and families, by working together with them to create an customized strategy to meet their life-long financial goals. Our goal at Waits Financial Group is to prepare our clients for their tomorrows while living for today,” said Casey D. Waits of Waits Financial Group.

The Five Star Wealth Manager award program is the largest and most widely published wealth manager award program in the financial services industry. 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.

“Five Star Wealth Managers are more than knowledgeable experts in their field. They maintain a sharp focus on building enduring relationships and demonstrate tremendous dedication to the families and individuals they serve,” stated Lynn Hargreaves, VP, Research and Services Operations, Five Star Professional.

Casey D. Waits's Five Star award profile can be viewed [here](#).

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. 2,862 Dallas wealth managers were considered for the award; 684 (4% of candidates) were named 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.

For research methodology information visit www.fivestarprofessional.com.