

CITY Five Star Wealth Manager seen in

# The Wall Street Journal

Wealth Management Journal Report

## Elizabeth V. Soto



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Since 1987, Elizabeth has operated a thriving practice and serves the financial planning needs of business owners, including doctors, retirees and Latin American entrepreneurs. She employs an extensive network of specialists.

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The Five Star Wealth Manager award, administered by Crescendo Business Services, LLC (a marketing research firm dba Five Star Professional), is based on 10 objective criteria. Eligibility 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 (As defined by Five Star Professional, the wealth manager has not: A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three customer complaints filed against them [settled or pending] with any regulatory authority or Five Star Professional's consumer complaint process. 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; C. Individually contributed to a financial settlement of a customer complaint filed with a regulatory authority; D. Filed for personal bankruptcy; E. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients; Evaluation criteria: 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 (above) or promotional products. The award methodology does not evaluate the quality of services provided and is not indicative of the winner's future performance or investment success. The inclusion of an individual on the final list should not be construed as an endorsement by Five Star Professional or this publication and there is no guarantee that the individual will be awarded again in the future. (6) CITY wealth managers were considered for the award; (7) ((8) percent of candidates) were named Five Star Wealth Managers.

**FIVE STAR**  
WEALTH MANAGER

