

# RAYMOND JAMES

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Media Contact: Nelson Wealth Managers, 800.657.8969  
RaymondJames.com/nelsonwealthmanagers

## **NORMAN NELSON OF NELSON WEALTH MANAGERS NAMED TO FORBES' LIST OF BEST-IN-STATE WEALTH ADVISORS**

WEST CONSHOHOCKEN, PA – Norman Nelson, Sr. Vice President, Investments, of Nelson Wealth Managers located at 300 Conshohocken State Rd, Ste. 400 was among the Raymond James-affiliated advisors named to the Forbes list of [Best-In-State Wealth Advisors](#). The list, which recognizes advisors from national, regional and independent firms, was released online April 4, 2023.

Forbes' Top Wealth Advisors Best-In-State 2023 ranking, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. This ranking is based upon the period from 6/30/2021 to 6/30/2022.

Those advisors who are considered have a minimum of seven years of experience, and the algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those who encompass best practices in their practices and approach to working with clients.

Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Out of approximately 39,007 nominations, 7,321 advisors received the award. This ranking is not indicative of an advisor's future performance, is not an endorsement and may not be representative of an individual client's experience.

Neither Raymond James nor any of its financial advisors or RIA firms pay a fee in exchange for this award/rating. Raymond James is not affiliated with Forbes or SHOOK Research, LLC. Please visit <https://www.forbes.com/lists/best-in-state-wealth-advisors/?sh=181ba856ab97> for more info.

Nelson, who joined Raymond James in 2002, has more than 35 years of experience in the financial services industry and established a proprietary, discretionary business practice for high-net-worth individuals with a keen eye toward the disciplines espoused by William J. O'Neil, Founder of *Investor's Business Daily* and bestselling author of the book *How to Make Money in Stocks: A Winning System in Good Times and Bad*.

To reach Norm or his team at Nelson Wealth Managers, more information can be found at [www.raymondjames.com/nelsonwealthmanagers](http://www.raymondjames.com/nelsonwealthmanagers) or by calling 484.534.3377.

### **About Forbes Top Best-In-State Wealth Advisors**

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#### **About Raymond James**

Raymond James Financial, Inc. (NYSE: RJF), is a leading diversified financial services company providing private client group, capital markets, asset management, banking and other services to individuals, corporations and municipalities. The company has approximately 8,700 financial advisors. Total client assets are \$1.17 trillion as of December 31, 2022. Public since 1983, the firm is listed on the New York Stock Exchange under the symbol RJF. Additional information is available at [raymondjames.com](http://raymondjames.com).

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