

February 18, 2021

FOR IMMEDIATE RELEASE

## **DANIELLE BLUNT NAMED TO FORBES LIST OF BEST-IN-STATE WEALTH ADVISORS**

Brea, CA — Danielle Blunt, CFP® CDFIA®, President of Blunt Wealth Services located at 2601 Saturn Street, Suite 100, Brea CA 92821 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 February 11, 2021.

The Forbes ranking of Best-In-State Wealth Advisors, 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. Those advisors that are considered have a minimum of seven years' experience, and the algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients.

Danielle Blunt who joined Raymond James in 2015, has more than 20 years of experience in the financial services industry.

To reach Danielle Blunt at Blunt Wealth Services more information can be found at [www.bluntwealthservices.com](http://www.bluntwealthservices.com) or by calling 657.216.2496.

### **About Forbes ranking of Best-In-State Wealth Advisors**

Data provided by [SHOOKTM Research, LLC](#).

Source: [Forbes.com](#) (January, 2021). The Forbes ranking of Best-In-State Wealth Advisors, 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. Those advisors that are considered have a minimum of seven years' experience, and the algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Out of approximately 32,725 nominations received, based on thresholds, more than 5,000 advisors received the award. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receives a fee in exchange for rankings. This ranking is not indicative of advisor's future performance, is not an endorsement, and may not be representative of individual clients' 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. For more information: [www.SHOOKresearch.com](http://www.SHOOKresearch.com).

### **About Raymond James Financial Services**

As of 12/31/2020. Raymond James Financial Services, Inc. is a financial services firm supporting independent financial advisors nationwide. Since 1974, Raymond James Financial Services Inc., member FINRA/SIPC, has provided a wide range of investment and wealth planning related services through its affiliate, Raymond James & Associates, Inc., member New York Stock Exchange/SIPC. Both broker/dealers are wholly owned subsidiaries of Raymond James Financial, Inc. (NYSE-RJF) a leading diversified financial services company with approximately 8,200 financial advisors throughout the United States, Canada and overseas. Total client assets are \$1.02 trillion. Additional information is available at [raymondjames.com](http://raymondjames.com).