

2013 Five Star Wealth Manager

Joyce Pearson
CFP® CDFATM



J Pearson Financial
Group LLC

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Expertise: 25 years of investment management and financial planning experience.
Integrity: putting the client's needs first and foremost, always.
Independence: being able to select from a wide array of strategies.

Securities and Advisory services through LPL Financial.
A registered investment advisor. FINRA/SIPC.

The Five Star Professional program recognizes outstanding professionals throughout the country. Joyce Pearson, a top Scottsdale financial advisor, was recognized as a Five Star Wealth in the September 2013 issue of Phoenix Magazine.

<http://www.fivestarprofessional.com/awards/index.php>

The Five Star Wealth Manager award process includes:

Nominations by peers and firms: Wealth managers, including financial planners and advisors, CPAs and estate planning attorneys, are nominated by their firm or a peer to be considered for the Five Star Wealth Manager award. Self-nominations are not accepted.

Objective selection process: Award candidates are evaluated against 10 objective criteria:

- Credentialed as an investment advisory representative (IAR), a FINRA-registered representative, a CPA or a licensed attorney
- Actively employed as a credentialed professional in the financial services industry for a minimum of five years
- Favorable regulatory and complaint history review
- Fulfilled their firm review based on internal firm standards
- Accepting new clients
- One-year client retention rate
- Five-year client retention rate
- Non-institutionalized discretionary and/or non-discretionary client assets administered;
- Number of client households served

- Educational and professional designations. No more than 7 percent of the wealth managers in a market receive the Five Star award