

Award and Third-Party Ratings Disclosures

Trent Leyda

2018 Forbes America's Top Wealth Advisors

Source: Forbes.com (Sept 2018) 2018 Forbes America's Top Wealth Advisors ranking awarded in 2018. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) during the period from 6/30/17 - 6/30/18. Neither SpirePoint Private Client, LLC nor its Financial Advisors paid a fee to SHOOK Research LLC to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of SHOOK Research LLC and this ranking may not be representative of any one client's experience. This ranking is not indicative of the Financial Advisor's future performance. SpirePoint Private Client, LLC is not affiliated with SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.

2019 Barron's Top 1,200 Financial Advisors: State-by-State

Source: Barron's.com (March 2019) Barron's Top 1,200 Financial Advisors: State-by-State ranking awarded in 2019. This ranking was determined based on an evaluation process conducted by Barron's during the period from Sept 2017- Sept 2018. Neither SpirePoint Private Client, LLC nor its Financial Advisors paid a fee to Barron's to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of Barron's and this ranking may not be representative of any one client's experience. This ranking is not indicative of the Financial Advisor's future performance. SpirePoint Private Client, LLC is not affiliated with Barron's. Barron's is a registered trademark of Dow Jones & Company, L.P.

2019 Forbes America's Top Wealth Advisors

Source: Forbes.com (Sept 2019) 2019 Forbes America's Top Wealth Advisors ranking awarded in 2019. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) during the period from 3/31/18 - 3/31/19. Neither SpirePoint Private Client, LLC nor its Financial Advisors paid a fee to SHOOK Research LLC to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of SHOOK Research LLC and this ranking may not be representative of any one client's experience. This ranking is not indicative of the Financial Advisor's future performance. SpirePoint Private Client, LLC is not affiliated with SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.

2020 Barron's Top 1,200 Financial Advisors: State-by-State

Source: Barron's.com (March 2020) Barron's Top 1,200 Financial Advisors: State-by-State ranking awarded in 2020. This ranking was determined based on an evaluation process conducted by Barron's during the period from Sept 2018- Sept 2019. Neither SpirePoint Private Client, LLC nor its Financial Advisors paid a fee to Barron's to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry

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2020 Forbes America's Top Wealth Advisors

Source: Forbes.com (August 2020) 2020 Forbes America's Top Wealth Advisors ranking awarded in 2020. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) during the period from 3/31/19 - 3/31/20. Neither SpirePoint Private Client, LLC nor its Financial Advisors paid a fee to SHOOK Research LLC to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of SHOOK Research LLC and this ranking may not be representative of any one client's experience. This ranking is not indicative of the Financial Advisor's future performance. SpirePoint Private Client, LLC is not affiliated with SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.

2021 Barron's Top 1,200 Financial Advisors: State-by-State

Source: Barron's.com (March 2021) Barron's Top 1,200 Financial Advisors: State-by-State ranking awarded in 2021. This ranking was determined based on an evaluation process conducted by Barron's during the period from Sept 2019- Sept 2020. Neither SpirePoint Private Client, LLC nor its Financial Advisors paid a fee to Barron's to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of Barron's and this ranking may not be representative of any one client's experience. This ranking is not indicative of the Financial Advisor's future performance. SpirePoint Private Client, LLC is not affiliated with Barron's. Barron's is a registered trademark of Dow Jones & Company, L.P.

2021 Forbes America's Top Wealth Advisors

Source: Forbes.com (August 2021) 2021 Forbes America's Top Wealth Advisors ranking awarded in 2021. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) during the period from 3/31/20 - 3/31/21. Neither SpirePoint Private Client, LLC nor its Financial Advisors paid a fee to SHOOK Research LLC to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of SHOOK Research LLC and this ranking may not be representative of any one client's experience. This ranking is not indicative of the Financial Advisor's future performance. SpirePoint Private Client, LLC is not affiliated with SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.

2022 Barron's Top 1,200 Financial Advisors: State-by-State

Source: Barron's.com (March 2022) 2022 Barron's Top 1,200 Financial Advisors: State-by-State ranking awarded in 2022. This ranking was determined based on an evaluation process conducted by Barron's during the period from Sept 2020 - Sept 2021. Neither SpirePoint Private Client, LLC nor its Financial Advisors paid a fee to Barron's to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under

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2022 Forbes America's Top Wealth Advisors

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2023 Barron's Top 1,200 Financial Advisors: State-by-State

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2023 Forbes America's Top Wealth Advisors & Best-In-State Wealth Advisors

2023 Forbes America's Top Wealth Advisors & Best-In-State Wealth Advisors Source: Forbes.com (April 2023) Forbes America's Top Wealth Advisors and Best-In-State Wealth Advisors rankings awarded in 2023. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) during the period from 6/30/21 - 6/30/22. Neither SpirePoint Private Client, LLC nor its Advisors paid a fee to SHOOK Research LLC for placement on its rankings. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of SHOOK Research LLC and this ranking may not be representative of any one client's experience; investors must carefully choose the right Financial Advisor or team for their own situation and perform their own due diligence. This ranking is not indicative of the Financial Advisor's future performance. SpirePoint Private Client, LLC is not affiliated with SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.

SpirePoint Private Client, LLC (FKA The Leyda Group)

2023 Forbes Best-In-State Wealth Management Teams

Source: Forbes.com (Jan 2023) 2023 Forbes Best-In-State Wealth Management Teams ranking awarded in 2023. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) during the period from 3/31/21 – 3/31/22. Neither SpirePoint Private Client, LLC nor its Financial Advisors paid a fee to SHOOK Research LLC for placement on its rankings. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of SHOOK Research LLC and this ranking may not be representative of any one client's experience; investors must carefully choose the right Financial Advisor or team for their own situation and perform their own due diligence. This ranking is not indicative of the Financial Advisor's future performance. SpirePoint Private Client, LLC is not affiliated with SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.