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WASHINGTON, D.C.  
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## Recent Recognitions Afforded to The Colony Group and Its Executives

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**Winner** of the national **2010 Best-in-Business IMPACT Award®**, part of Charles Schwab & Co., Inc.'s IMPACT Awards program, which recognizes an independent investment advisory firm that has elevated business management to new levels of excellence and achieved exceptional business results (2010)

**Ranked** nationally among top 100 independent investment advisors by *Barron's* (2007; 2009; 2010; 2011)

**Ranked** first among Massachusetts-based advisors on *Barron's* list of top 100 independent investment advisors (2009)

**Ranked** nationally among top 100 fee-only financial advisors by *Forbes* (2009)

**Ranked** nationally as one of top wealth managers by *Wealth Manager* (2009)

**Ranked** nationally among top 100 registered investment advisors by *Financial Advisor* (2008; 2009; 2010; 2011)

**Ranked** nationally among top 100 registered investment advisors by *Registered Rep* (2008)

**Ranked** nationally as "Top Guns" investment manager by Informa Investment Solutions (Q2 2005, Q4 2006, Q1 2007, Q2 2007, Q3 2007, Q4 2007, Q1 2008)

**Ranked** among top 10 Massachusetts-based advisors on *Worth's* national list of top 250 wealth advisors (2008)

**Ranked** among "Area's Largest Independent Investment Advisors" by the *Boston Business Journal* (2008; 2009; 2010)

**Ranked** among "FIVE STAR Wealth Managers" by *Boston Magazine* (2010; 2011)

*See reverse for disclosures regarding awards and recognitions granted to The Colony Group and its executives.*

A blurred background image showing a person's hand holding a pen over a desk, with a pair of glasses visible on the right side.

## Disclosures Regarding Awards and Recognitions Granted to The Colony Group and Its Executives

Awards and recognitions by unaffiliated rating services, companies, and/or publications should not be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if The Colony Group is engaged, or continues to be engaged, to provide investment advisory services; nor should they be construed as a current or past endorsement of The Colony Group or its representatives by any of its clients. Rankings published by magazines and others are generally based exclusively on information prepared and/or submitted by the recognized advisor. Moreover, with regard to all performance information contained herein, directly or indirectly, if any, users should note that past results are not indicative of future results. Please see below for a more detailed description of the criteria used with respect to the awards and recognitions granted to The Colony Group and, as indicated below, its individual employees.

**Best-in-Business IMPACT Award:** The Best-in-Business IMPACT Award recognizes an independent investment advisory firm that has elevated business management to new levels of excellence and achieved exceptional business results.

The Colony Group and its employees are independent of and are not employees or agents of Charles Schwab & Co., Inc. ("Schwab"). Schwab does not prepare, verify or endorse information distributed by The Colony Group. The Best-in-Business Award, part of Schwab's IMPACT Awards program, is not an endorsement, testimonial endorsement, recommendation, or referral to The Colony Group with respect to its investment advisory and other services.

**Barron's criteria:** Advisor's assets under management, contribution to the firm's revenues and profits, and quality of service. The *Barron's* lists included The Colony Group's CEO.

**Forbes criteria:** Firm's discretionary assets under management as well as certain qualifying criteria. The *Forbes* list included The Colony Group.

**Wealth Manager criterion:** Average assets under management per client. The *Wealth Manager* list included The Colony Group.

**Financial Advisor criterion:** Assets under management. The *Financial Advisor* lists included The Colony Group.

**Registered Rep criterion:** Assets under management. The *Registered Rep* list included The Colony Group.

**Informa Investment Solutions criteria:** Top 10 performing strategy over the latest three-year period; strategy must outperform the relative style benchmark for the three latest three-year rolling periods; and strategy must have a standard deviation equal to or less than the median standard deviation for its peer group. "Top Guns" status was awarded to The Colony Group's mid-cap equity strategy.

**Worth criteria:** Individual advisor's expertise, integrity, and dedication to the field of wealth management; portfolio management strategies; risk analysis; client service initiatives; and the educational and professional credentials of advisors. The *Worth* list included The Colony Group's CEO.

**Boston Business Journal criterion:** Assets under management for Greater Boston-based firms. The *Boston Business Journal* list included The Colony Group.

**Boston Magazine criteria:** Customer service, integrity, expertise, communication, value, meeting of objectives, service, quality of recommendations, and overall satisfaction. The *Boston Magazine* list included two Senior Financial Counselors of The Colony Group for 2010 and one for 2011.