The Ric Edelman Show - Ric Edelman Bio

ABOUT RIC EDELMAN

For more than 30 years, Ric Edelman, widely regarded as one of the top financial planners in the nation, has been teaching Americans about personal finance.

In 2016 *Forbes* named him among the country's Top 10 Wealth Advisors; *Barron's* ranked him the nation's #1 Independent Financial Advisor (three times); He has been named or voted as among the profession's most influential figures by RIABiz, one of the 15 most transformative people by *Investment News*, and winning Advisor 25 award from *Investment Advisor* magazine.

Ric was inducted into *Research* magazine's Financial Advisor Hall of Fame in 2004 and is the 2017 recipient of the IARFC's Loren Dunton Memorial Award for lifetime achievement.

In addition to his weekly radio show, Ric has produced a series of specials for Public Television, and he's a #1 *New York Times* bestselling author whose 10 books on personal finance have more than 1 million copies collectively in print. *The Truth About Money* and *The Lies About Money* were both named "Book of the Year" by the Institute for Financial Literacy. His ninth book, *The Truth About Your Future*, published in 2017, was an instant *New York Times* Business Best Seller. His most recent book, a children's book written with his wife Jean, debuted in November 2018.

Today, Edelman Financial Engines serves more than 1.1 million Americans, managing more than $200 billion in assets, providing services to workplace 401(k) plans, and helping consumers with all their financial planning and investment management needs with 320 advisors in 140 offices coast-to-coast.

1. Forbes rankings are the opinion of SHOOK Research and are based on advisor interviews, client retention, industry experience, compliance record, assets under management and revenue generated for the firm. Investment performance is not considered. Advisors do not pay to be in the ranking.
2. According to Barron's, "The formula [used] to rank advisors has three major components: assets managed, revenue produced and quality of the advisor's practice. Investment returns are not a component of the rankings because an advisor's returns are dictated largely by each client's risk tolerance. The quality-of-practice component includes an evaluation of each advisor's regulatory record." The rankings are based on the universe of applications submitted to Barron's. The selection process begins with a nomination and application provided to Barron's. Principals of Edelman

Financial Services, LLC self-nominated the firm and submitted quantitative and qualitative information to Barron's as requested. Barron's reviewed and considered this information, which resulted in the rankings on Aug. 27, 2012/Aug. 28, 2010/Aug. 31, 2009.

3. The RIABiz listing of the 10 most influential figures in the Registered Investment Advisor industry is in recognition of notable, driven and influential executives who are advancing their firms and are considered to be influential in the RIA business. Investor experience/returns were not considered as part of this ranking.
4. InvestmentNews 15th Anniversary Issue. June 23, 2013
5. The *Investment Advisor* magazine listing of the Investment Advisor 25 is based on readers' opinions and highlights those who are ahead of the pack with their insights, innovation and disruption. Advisors and other industry participants cast about 12,000 total votes for leaders in the following six categories: RIA/Advisory; Independent Broker-Dealers; Custody & Clearing; Portfolio, Investing & the Markets; Politics/Regulation/Compliance; and Fintech/IA/AI. Investor experience/returns were not considered as part of this ranking.
6. Research magazine cover story "Advisor Hall of Fame," December 2004 (based on serving a minimum of 15 years in the industry, having acquired substantial assets under management, demonstrating superior client service and having earned recognition from peers and the broader community for how they reflect on their profession). Investor experience/returns were not considered as part of this ranking.
7. Presented by the International Association of Registered Financial Consultants (IARFC). Candidates must hold a professional designation and must have disseminated their comments on financial topics by having them widely published in articles, journals, books, etc. They must have provided outstanding personal service or leadership in the financial services industry. Nominees must have participated in some aspect of financial education to the public or to other members of the profession. Investor experience/returns were not considered.
8. In 2011 The Truth About Money 4th Edition received the Book of the Year Award from the Institute for Financial Literacy for Excellence in Financial Literacy Education. Each year, the Institute for Financial Literacy presents EIFLE Awards to individuals and organizations that have shown exceptional innovation, dedication and commitment to the field of financial literacy education.
9. In 2009 The Lies About Money received the Retail Book of the Year Award from the Institute for Financial Literacy for Excellence in Financial Literacy Education. Each year, the Institute for Financial Literacy presents EIFLE Awards to individuals and organizations that have shown exceptional innovation, dedication and commitment to the field of financial literacy education.
10. *The New York Times* Book Review Advice, How-To and Miscellaneous. April 16, 2017.