FREQUENTLY ASKED QUESTIONS

Learn more about participating in the Thrive Awards

The WealthManagement.com Thrive Awards recognize and honor the fastest-growing financial advisors in America.

HOW IS THE THREE-YEAR GROWTH RATE CALCULATED?

The equation for growth percentage is:

$$\frac{\text{(2018 revenue - 2015 revenue)}}{\text{2015 revenue}} \times 100\% = \textbf{Total Growth Percentage}$$

For example, if your 2015 revenue was $3 million and your 2018 revenue is $15 million:

$$\frac{(\$15{,}000{,}000 - \$3{,}000{,}000)}{\$3{,}000{,}000} \times 100\% = \textbf{Total Growth Percentage}$$

$$\frac{\$12{,}000{,}000}{\$3{,}000{,}000} \times 100 = 4 \times 100\% = \textbf{400\%}$$

WILL THE GROWTH RATE BE MADE PUBLIC?

No, the growth rate will not be made public and revenue figures as provided by the application will remain confidential

HOW DOES WEALTHMANAGEMENT.COM DEFINE REVENUE?

WealthManagement.com defines revenue as gross revenue from AUM fees, commissions, trails, hourly or subscription fees, retainers and other similar wealth and investment management revenues before any costs or expenses. Revenue figures should be rounded no more than to the nearest thousand.

DO I HAVE TO BE PROFITABLE TO BE ELIGIBLE?

No. The Thrive Awards are determined solely by revenue growth; profitability is not a consideration.

WHAT IS REVENUE VERIFICATION?

To ensure the integrity and credibility of the list, we carefully verify the 2015 and 2018 revenue numbers for every applicant.

WHAT ARE REVENUE VERIFICATION MATERIALS?

Simply download and complete the Revenue Verification Form (available on the nomination site).

Then have a certified public accountant, chartered financial analyst, certified management accountant, or attorney sign the form attesting to the complete accuracy of the information. The verifier may work at the applicant firm or be independent, as long as the verifier is a licensed professional with credentials that are current and in good standing. The completed, verified form should then be uploaded in Step 4 of the application process.

HOW SHOULD I SUBMIT MY REVENUE VERIFICATION MATERIALS?

The only way to submit your revenue verification information is through our secure application platform. You will see questions that prompt you to upload verification materials during Step 4 of the application process.

WILL MY REVENUE FIGURES BE MADE PUBLIC?

No. All revenue data provided by you will be kept strictly confidential and seen only by our review panel. If your nominee is named to the Thrive Awards list of fastest-growing advisors then your revenue growth rate, as calculated by our review panel, will be used in promotion of the Thrive Awards and your honoree status.

I WOULD LIKE TO APPLY BOTH AS AN INDIVIDUAL AND A FIRM. IS THAT ALLOWED?

Yes. You may also apply as a team. Separate applications and fees will need to be submitted.

I AM A SOLO ADVISOR WORKING AT A LARGE FIRM. AM I ELIGIBLE?

Yes, as long as you meet the rest of our requirements, you are eligible.

IF MY FISCAL YEAR DOESN'T END IN DECEMBER, WHAT SALES NUMBERS SHOULD I FILL IN FOR EACH YEAR?

We ask all applicants to submit their revenue figures for full calendar years. Companies with non-calendar fiscal years should use our Revenue Verification Form for verification, rather than tax forms or audits. Please make sure the revenue figures entered on the form are for calendar years 2015 and 2018.

WHAT IS YOUR CANCELLATION POLICY?

After you submit verification to support your revenue numbers, you may not withdraw from consideration for the 2019 Thrive Awards.

WHAT IF I HAVE MORE QUESTIONS?

We're here to help! If you have any questions or concerns, please email **Thrive@wealthmanagement.com.**