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# BEST-IN-STATE WEALTH ADVISORS

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## #114 **JAMES E. DY**

**Private Advisor Group**
Bedminster, New Jersey

Minimum Account Size for New Business
**$0**

Team Assets (Custodied)
**$1.4B**

Typical Size of Household Accounts
**$1-10M**

### FORBES BEST-IN-STATE WEALTH ADVISORS 2024 METHODOLOGY

Advisors are selected based on an algorithm of qualitative criteria gained through telephone, virtual and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of four years' experience, and the algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices. Investment performance is not a criterion because client objectives and risk tolerances vary, and professionals rarely have audited performance reports. Individuals must carefully choose the right advisor for their own situation and perform their own due diligence. SHOOK's research and rankings provide opinions intended to help individuals choose the right advisor and are not indicative of future performance or representative of any one client's experience. Past performance is not an indication of future results. Neither Forbes nor SHOOK receive a fee in exchange for placement on rankings.

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