Procyon Partners' Jerry Sneed and Frank McKiernan Recognized by Forbes and Shook Research as Top Next-Gen Wealth Advisors Best-In-State for 2024

Procyon Partners is proud to announce that Jerry Sneed, CFA®, CAIA® and Frank McKiernan have been recognized by Forbes and Shook Research as top Next-Gen Wealth Advisors Best-In-State for 2024. This prestigious honor highlights their exceptional expertise and dedication to their clients, solidifying their positions as leaders in the wealth management industry.

The Forbes/SHOOK Top Next-Gen Advisors Best-In-State list, which includes 1,621 top professionals who collectively manage nearly $2.8 trillion in assets, identifies the industry's rising stars—advisors born in 1985 or later with at least four years of experience. With the average age of a financial advisor now at 56, and fewer than one-third of advisors under 40, the recognition of Sneed and McKiernan underscores the critical importance of fresh talent in financial advice.

"We are honored to be recognized by Forbes and Shook Research," said Jerry Sneed. "This acknowledgment is a testament to the hard work we put in every day to ensure our clients are well-positioned for the future."

Frank McKiernan added, "This recognition motivates us to continue pushing boundaries and delivering the highest level of service to our clients."

Phil, CEO of Procyon Partners, praised the duo's achievements: "Jerry and Frank embody the next generation of wealth advisors, and their recognition by Forbes is well-deserved. At Procyon Partners, we understand the importance of supporting and growing talent like Jerry and Frank—not only for the success of our firm but also to provide our clients with the innovative and forward-thinking advice they need in a rapidly changing world."

Jerry Sneed, CFA®, CAIA®
Senior Vice President,
Senior Private Wealth Advisor

Frank J. McKiernan
Senior Vice President,
Senior Private Wealth Advisor

Data provided by SHOOK® Research, LLC. Data as of 3/31/24. SHOOK considered advisors born in 1985 or later with a minimum 4 years as an advisor. Advisors have: built their own practices and lead their teams; joined teams and are viewed as future leadership; or a combination of both. Ranking algorithm is based on qualitative measures: telephone and in-person interviews to measure best practices. Also reviewed: client retention, industry experience, credentials, review of compliance records, firm nominations; and quantitative criteria, such as: assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and audited performance reports are rare. SHOOK's research and rankings provide opinions intended to help investors choose the right financial 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 Research receive compensation in exchange for placement on the ranking. For more information, please see www.SHOOKresearch.com. SHOOK is a registered trademark of SHOOK Research, LLC.

One Corporate Park · Suite 225 · Shelton, CT · (844) PROCYON · procyonpartners.net