

## **PRESS RELEASE**

### **FIVE STAR: Best in Client Satisfaction Wealth Managers (SM) Announced Drew Kanaly, James Shelton and Scott Hill Named to List**

Posted: September, 3 2009

Houston, TX (September 3, 2009) - In the September issue of TEXAS MONTHLY (Houston area), the 2009 FIVE STAR: Best in Client Satisfaction Wealth Managers (SM) are announced. Three professionals from Kanaly Trust were named to the list: Drew Kanaly, Chairman; James Shelton, Chief Investment Officer; and Scott Hill, Sr. Vice President and Financial Advisor.

TEXAS MONTHLY formed a partnership with Crescendo Business Services, an independent research firm, to identify the “best in client satisfaction” wealth managers serving the Houston area. In January, Crescendo surveyed, by mail and phone 95,000 high-net-worth residents in the Houston area and subscribers of TEXAS MONTHLY. An additional 5,700 surveys were sent to leaders of financial service industry companies.

On the surveys, recipients were asked to select only wealth managers whom they knew through personal experience, and to evaluate them based upon nine criteria: customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting of financial objectives, post-sale-service, quality of recommendations and overall satisfaction.

By February, stacks of surveys had arrived and Crescendo began carefully scoring each wealth manager. Both positive and negative evaluations were included in the scoring. Only wealth managers with five years of experience in the financial services industry were considered.

Next, each wealth manager was reviewed for regulatory actions, civil judicial actions and customer complaints as reported by FINRA (the Financial Industry Regulatory Authority) and other regulatory agencies.

Then, before finalizing the list, wealth managers were reviewed by a blue-ribbon panel. The blue-ribbon panel was comprised of knowledgeable individuals from within the financial services industry. Although panelist comments were incorporated into the final score, safeguards were built into the review process to reduce the ability of panel members to influence the composition of the final list on the basis of company affiliation.

The resulting list of 2009 FIVE STAR Wealth Managers represents those wealth managers in the Houston area, which scored highest in client satisfaction. These wealth managers represent less than 2 percent of the wealth managers in the

Houston area. Crescendo hopes this list serves as a referral network for the 702,481 readers of TEXAS MONTHLY (Houston area).