DANIEL S. ROMERO, CFP® RECOGNIZED IN FORBES AS A 2021 BEST-IN-STATE WEALTH ADVISOR

Daniel S. Romero, CFP® of Romero Wealth Mgmt. ranked No. 61 in California in the 2021 Best-In-State Wealth Advisors list published by Forbes.

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According to Forbes, the annual list spotlights the nation's top-performing advisors, evaluated based on a methodology developed by SHOOK Research. Advisors are also evaluated based on personal interviews, industry experience and revenue trends, among other criteria.

"On behalf of LPL Financial, we congratulate Daniel for being recognized on this year's Forbes Best-in-State Wealth Advisors list. This past year has demonstrated that strong financial advice cannot be underestimated, and that personalized financial advice is critical in helping clients work toward achieving their short and long-term financial goals," said Angela Xavier, LPL executive vice president, Independent Advisor Services. "We applaud Daniel for continuing to raise the bar in our industry and demonstrate the value of the independent model in creating meaningful and long-lasting investor-advisor relationships."

Daniel S Romero, CFP® is based in Orange, CA and provides a full range of financial services, including retirement and financial planning, individual money management, individual stocks and bonds, mutual funds, annuities and more.

Romero is an independent advisor affiliated with LPL Financial, the nation's largest independent broker-dealer* and a leader in the retail financial advice market, providing resources, tools and technology that support advisors in their work to enrich their clients' financial lives.

About LPL Financial
LPL Financial is a leader in the retail financial advice market and the nation's largest independent broker-dealer*. We serve independent financial advisors and financial institutions, providing them with the technology, research, clearing and compliance services, and practice management programs they need to create and grow thriving practices. LPL enables them to provide objective guidance to millions of American families seeking wealth management, retirement planning, financial planning and asset management solutions. LPL.com

*Based on total revenues, Financial Planning magazine, June 1996-2020

LPL Financial, Forbes magazine and Romero Wealth Management are all separate entities. The Forbes Best-In-State Wealth Advisor ranking, developed by SHOOK Research, is based on in-person and telephone due diligence meetings and a ranking algorithm that includes: client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK Research receives a fee in exchange for rankings.

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