

Daryl R. Ellis Named to Forbes' Top Financial Security Professionals Best-in-State List 2022

Daryl R. Ellis, CFP®, CAP®, from Baton Rouge, has been listed on the 2022 Forbes Top Financial Security Professionals Best-in-State list.

BATON ROUGE, LOUISIANA, US, September 19, 2022 /EINPresswire.com/ -- Daryl R. Ellis, CFP®, CAP® from the Louisiana General Office of New York Life has been listed on the 2022 Forbes Top Financial Security Professionals Best-in-State list. The individuals named to this list of distinguished professionals were chosen based on many criteria considered by an independent research firm.

A New York Life agent for 27 years, Mr. Ellis received this recognition for helping his clients in a world in which wealth preservation and protection matter more than ever.

"We are honored that Daryl appears on this prestigious list," said David Johnson, managing partner of the Louisiana General Office. "New York Life has known for quite some time what a valuable asset Daryl has been to our family and to many families and businesses in our community."

Daryl Ellis is a second-generation advisor and principal of Ellis Insurance & Financial Group, which focuses on helping people enjoy their life as they prepare for the future. Daryl is a CERTIFIED FINANCIAL PLANNER™ and Chartered Advisor in Philanthropy®. He's passionate about being involved in his community, and he volunteers on the steering committee for Heritage Ranch, and as a member of Good Fellows-Good Samaritans in Baton Rouge. He is a Louisiana State University alumnus and has his bachelor's degree in economics. Daryl and his wife Tiffany enjoy traveling the country and spending time in the great outdoors.

For more information about Daryl and Ellis Insurance & Financial Group, visit EllisFinancial.com.



Daryl R. Ellis, Financial Advisor & Principal of Ellis Insurance & Financial Group



We are honored that Daryl appears on this prestigious list.”

David Johnson, managing partner of the Louisiana General Office

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rankings (including the Best-In-State Financial Security Professional rankings), which are determined independently (see methodology). FSP refers to professionals who are properly licensed to sell life insurance and annuities. FSPs may also hold other credentials and licenses which would allow them to offer investments and securities products through those licenses. Ranking algorithm is based on qualitative measures learned through telephone, virtual, and in-person interviews to measure best practices, client retention, industry experience, credentials, review of compliance records, firm nominations; and quantitative criteria, such as assets under management, sales figures, and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and these professionals rarely have audited performance reports. Individuals must carefully choose the right FSP for their own situation and perform their own due diligence. SHOOK’s research and rankings provide opinions intended to help individuals choose the right FSP and are not indicative of future performance or representative of any one client’s experience. Past performance is not an indication of future results. For more information, please see www.SHOOKresearch.com. SHOOK is a registered trademark of SHOOK Research, LLC.

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