

Destiny Wealth Partners Ranked No. 4 in Florida by Forbes/SHOOK Top RIA Firms 2024

TAVARES, FL, UNITED STATES, November 26, 2024
/EINPresswire.com/ -- Central Florida-based [Destiny Wealth Partners](#) has been ranked in the fourth spot in Florida in the third annual Forbes ranking of [America's Top RIA Firms](#), developed by [SHOOK Research](#).



The announcement was made by Destiny Wealth Partners Founder and CEO Thomas Ruggie, ChFC®, CFP®, and highlights the top 250 advisory firms that have what Forbes calls “strong track records when it comes to stewarding client wealth and preserving it for the long term.”

Destiny Wealth Partners is an independent RIA based in Central Florida, which conducts business as Destiny Family Office, Ruggie Wealth Management and Nichols Wealth Partners. In 2023, Destiny Wealth Partners, which has about \$1.2B in assets managed, was also recognized among Forbes 250 Fastest-Growing RIA Firms, and Top RIA Firm. Ruggie, an entrepreneur and 30+ year veteran of the financial industry, is also ranked #1 in North Florida on the list of Forbes 2024 Best-in-State Wealth Advisors. In addition, Destiny Wealth Partners is the 2024 InvestmentNews RIA Team of the Year (10 or More Advisors).

“Our place near the top of the list of Florida’s leading firms is a result of the dedication and commitment of our entire team,” said Ruggie. “I believe that having an ongoing presence in this ranking is due in part to the depth and breadth of our capabilities, our unwavering focus on putting our clients first in everything we do, and our proactive decision never to be complacent. We are innovators who are always on the lookout for new ways to improve the offerings and the experience we provide our clients.”

According to Shook Research, its focus on how each client is actually treated by their independent advisor has led them to measure processes that are inherent in each client relationship, the team’s purpose and the underlying culture at all levels. They look closely at the leadership who is primarily responsible for shaping the client’s experience, and question, “Would we recommend this firm (or individual) to a friend or family member?”

The Forbes ranking is based on qualitative criteria, mostly gained through telephone, virtual and in-person due diligence interviews, and quantitative data. Its algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those

that encompass best practices and approach to working with clients. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings.

Investment advisory services offered through Destiny Wealth Partners, LLC, an SEC Registered Investment Advisor. Destiny Wealth Partners also conducts business under the names Ruggie Wealth Management, Destiny Family office, and Nichols Wealth Partners. Recognitions are specific to Tom Ruggie, ChFC®, CFP®, or Destiny Wealth Partners and its firms. Listing in any publication is not a guarantee of future investment success. These recognitions should not be construed as an endorsement of the advisor by any client. Additional disclosures and important information at www.destinywealthpartners.com/disclosures.

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