



## Zacks Investment Management included on USA TODAY's Best Financial Advisory Firms 2026 List!

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**CHICAGO, ILLINOIS** — Zacks Investment Management has been awarded on USA TODAY's list of the Best Financial Advisory Firms 2026. This prestigious award is presented by USA TODAY and Statista Inc., the world-leading statistics portal and industry ranking provider. The awards list was announced on April 15<sup>th</sup>, 2026, and can be viewed on [USATODAY.COM](https://www.usatoday.com)\*

The Best Financial Advisory Firms 2026 list awards the top registered investment advisory (RIA) firms in the United States based on two dimensions:

► **Recommendations from financial advisors, clients, and industry experts:**

Recommendations were collected via an independent survey among over 30,000 individuals. Clients, industry experts, and financial advisors working for an RIA firm could recommend the RIA firms they find commendable.

► **Development of Assets under Management (AUM):**

Both short-term (12-month) and long-term (5-year) AUM development were analyzed using publicly available data.

Based on the results of the study, Zacks is ecstatic to be recognized on USA TODAY's list of the Best Financial Advisory Firms 2026.

Statista publishes hundreds of worldwide industry rankings and company listings with high-profile media partners. This research and analysis service is based on the success of statista.com, the leading data and business intelligence portal that provides statistics, relevant business data, and various market and consumer studies and surveys.

*"Zacks continues to deliver strong results, even in times of uncertainty and volatility. In fact, that is when it is most important to trust the data, apply the models, and do the hard work of managing risks ahead of turbulent times. As it is often said, 'You build your ship ahead of the storm—not while you are in it.'"*

**Brian Mulberry**

Client Portfolio Manager

### About Zacks Investment Management

Zacks Investment Management is an independent, boutique firm established in 1992. As a wholly owned subsidiary of one of the largest and most influential independent research firms in the U.S., Zacks Investment Research, we focus on data-driven investing customized to the needs of our clients. By channeling the insights of our parent firm, we seek to help investors methodically reduce risk and improve returns over time.

\* This ranking was awarded by USA Today on 4/15/2026 in respect of the calendar year period of 1/1/2021 to 12/31/2025. We do not compensate USA Today to obtain this ranking. However, we pay compensation to USA Today to use their logo in connection with advertising this ranking. Zacks Investment Management did not provide any performance metrics to USA Today in regard to this ranking. **Please see full disclosure at end of this document.**

## DISCLOSURE

### **Past performance is no guarantee of future results. Inherent in any investment is the potential for loss.**

Zacks Investment Management, Inc. is a wholly-owned subsidiary of Zacks Investment Research. Zacks Investment Management is an independent Registered Investment Advisory firm and acts as an investment manager for individuals and institutions. Zacks Investment Research is a provider of earnings data and other financial data to institutions and to individuals.

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**USA TODAY RANKING:** This information is distributed for informational purposes only; to notify readers of a USA Today ranking. USA Today has no affiliation with Zacks, but rather evaluates investment manager performance on an objective basis. Criteria: To be eligible, firms must be registered as an investment advisory firm (RIA firm) with the SEC and/or at state level for at least one year, maintain a principal office in the United States, have a clean disciplinary record, provide financial planning or portfolio management services to individuals and/or small businesses, and manage more than \$500,000 in AUM. The ranking is based on a scoring model that includes client and peer recommendations and AUM development. Recommendations come from financial advisors, clients, and industry experts and were collected via an independent survey among over 30,000 individuals. Clients, industry experts, and financial advisors working for an RIA firm could recommend the RIA firms they find commendable. Both short-term (12-month) and long-term (5-year) AUM development were analyzed using publicly available data. Based on the survey results, a score was calculated for each firm by equally weighting the recommendations from all three target groups: clients, industry experts, and financial advisors. Survey results from the past two years were included in the calculation with a reduced weighting. Self-recommendations were prohibited and were therefore not included in the evaluation. Recommendations score weight: 20%. Data from the SEC IAPD regulatory database were collected through January 2026 to track companies' AUM development. An AUM development score was calculated by combining short- and long-term trends, with short-term development measured over the twelve-month period from January 2025 to January 2026 and long-term over the five-year period from 2021 to 2026, using a 30/70 weighting. Data score weight: 80%. This ranking was awarded by USA Today on 4/15/2026 in respect of the calendar year period of 1/1/2021 to 12/31/2025. We do not compensate USA Today to obtain this ranking. However, we pay compensation to USA Today to use their logo in connection with advertising this ranking. Zacks Investment Management did not provide any performance metrics to USA Today in regard to this ranking.