NEWS

For Immediate Release

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Travis Alexander CEO of Crux Wealth Advisors named to "150 Advisors to Watch" List

AdvisorHub ranks Crux #50 on the list of financial advisory firms with over one billion in Client Assets

Long Beach, CA (July 30, 2024) – Travis Alexander, Founder and CEO of Crux Wealth Advisors, an SEC Registered Investment Advisor (RIA) specializing in providing fiduciary financial planning and investment management services to clients nationwide, was named on June 20, 2024 to the 2024 AdvisorHub 150 Advisors to Watch over $1B – ranking #50 on the list. According to the publisher, all who made the lists represent sophisticated practices that achieved scale without compromising their level of service and maintain a commitment to professionalism.

"Thrilled to be recognized for growth alongside excellent service," said Mr. Alexander. "This award reflects the dedication of the entire Crux team - advisors, staff, and leadership."

Travis Alexander, a visionary leader, built Crux Wealth Advisors by offering a comprehensive suite of resources that empowers advisors to maximize the impact on their clients' financial success. His commitment to personalized financial advising is rooted in the Crux core values: Integrity, innovation, and client-centricity. By combining a systematized approach with a dedicated team, Crux Wealth Advisors goes to great lengths to provide a holistic approach of creative, bespoke financial planning to help clients achieve their goals.

LIST METHODOLOGY

The 2024 AdvisorHub 150 Advisors to Watch over $1B ranking is based on an algorithm of criteria, focused on three key areas: Quality of practice, year-over-year growth, and professionalism and character. The rankings weigh the scores in quality and growth more heavily than other areas. Out of 1,816 total nominations received, only 150 advisors were recognized. Advisors considered have a minimum of seven years' experience, a clean regulatory record with two or fewer complaints and no significant judgements, must have been with their current firm for at least two years and in good standing, and have at least $100 million in assets under management. The time period upon which the ratings are based is from December 31, 2022 – December 31. 2023. More information on the ranking methodology is available here: https://www.advisorhub.com/advisors-to-watch-over-1b-2024/.

"While the 1,000 Advisors to Watch ranking relies on practice data, what it ultimately measures is an advisor's resilience and drive to succeed," wrote Tony Sirianni, Publisher and CEO of AdvisorHub. "We recognize advisors who are still winning business and growing, regardless of where they are in their career."

Rankings are not based in any way on the individual's abilities in regard to providing investment advice or management. A ranking is not indicative of an advisor’s future performance, is not an endorsement, and may not be representative of individual clients’ experience. Neither Raymond James nor any of its financial advisors or RIA firms pay a fee in exchange for this award/rating. Raymond James is not affiliated with AdvisorHub.

ABOUT CRUX WEALTH ADVISORS AND TRAVIS ALEXANDER

Crux Wealth Advisors (Crux) is an independent financial advisory firm specializing in fiduciary financial planning and investment management. Led by Travis Alexander, MBA, CRPC®, CEO, the Crux mission is to help advisors and their clients achieve financial independence on their terms. Mr. Alexander earned an MBA from Gonzaga University, and a bachelor’s degree from the Hugh Downs School of Human Communication from Arizona State University. Forbes named him to their “Best in State” list in 2023 and their “Top Next Gen Advisors” (both national and state lists) in 2022. AdvisorHub named him to their “150 Advisors to Watch” list in 2024.

Having affiliated with Raymond James Financial Services, Inc. in 2016 as a four-person team managing approximately $100 million, the firm is now fully independent as an SEC Registered Investment Advisor, with client assets currently topping $1.1 billion. Securities are offered through Raymond James Financial Services, Inc., member FINRA / SIPC. Investment advisory services are offered through Crux Wealth Advisors. Crux Wealth Advisors is not a registered broker/dealer and is independent of Raymond James Financial Services.

With nine locations across the USA at the current time, Crux Wealth Advisors is growing rapidly and welcomes inquiries from advisors and advisor teams seeking a supported independent RIA model. Learn more at www.CruxWealthAdvisors.com.

The Forbes Top Wealth Advisors Best-In-State 2023 ranking, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. This ranking is based upon the period from 6/30/2021 to 6/30/2022 and was released on 4/4/2023. Those advisors that are considered have a minimum of seven years of experience, and the algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Out of approximately 39,007 nominations, 7,321 advisors received the award. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Raymond James is not affiliated with Forbes or Shook Research, LLC.

The Forbes Next-Gen Wealth Advisors Best-In-State rankings, developed by SHOOK Research, is based on an algorithm of qualitative criterion, mostly gained through telephone and in-person due diligence interviews, and quantitative data. Those advisors that are considered are under 40, have a minimum of four years' experience, and the algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass the highest standards of best practices. 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. The Research Summary (as of August 2022) included: 35,465 nominations for all rankings, based on thresholds, 19,986 invited to complete online survey, 14,892 telephone interviews, 3,038 in-person interviews at advisors' location, 1,357 virtual interviews and 3,513 individuals considered and 1,000 individuals won the Next-Gen ranking. This ranking is based upon the period from 3/31/21 to 3/31/22 and was released on 8/3/22. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. For more information and complete details on methodology, go to www.shookresearch.com.

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