SPECIAL ADVERTISING SECTION
WEALTH MANAGERS

# ROI Financial Advisors

## MEET THE TEAM

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## Simple. Smart. Effective.

*Financial planning is for everyone. Really.*

What is financial planning and who needs it? These aren't just good questions — they're essential to your future happiness! Many people think financial planning is just for the ultra-rich, but at ROI Financial, we believe planning is important for everyone. Here's why.

Investopedia defines a financial plan as "a document that details a person's current financial circumstances, their short—and long-term monetary goals, and their strategies to achieve those goals." At ROI, we take this idea further with hands-on, step-by-step help all along the way. ROI CEO Lance Johnson says, "It truly doesn't matter how small you start. The important thing is to start moving toward your dreams right now. There's no other way to get from here to there."

Whether you're just starting out, mid-career, late-career or retired, it's never too soon (or too late) to think about what's important to you. And if it's important to you, you can be sure it's important to us, too. ROI makes financial planning affordable and accessible, with just the services you need to achieve your goals. Our personalized plans are simple, smart and effective. Johnson says, "Planning helps you pay less in taxes and do more wealth-building. You don't have to do everything today, but do something. Just take one step. Your future self will thank you." What's an easy first step? Give us a call.

ROI Financial Advisors, LLC (Dba ROI Financial) Is An SEC Registered Investment Advisor.

FIVE STAR WEALTH MANAGER AWARD WINNER

## HIGHLIGHTS

- Simple, smart, *effective*
- *Brilliant* at the basics
- Driven by dreams (*yours*)
- Expert *wealth* builders
- Focused on *you*
- *Integrated* for better results


ROI FINANCIAL
A Registered Investment Advisor

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FIVE STAR WEALTH MANAGER AWARD WINNER

This award was issued on 05/01/2025 by Five Star Professional (FSP) for the time period 07/31/2024 through 12/31/2024. Fee paid for use of marketing materials. Self-completed questionnaire was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria. 1,948 Portland-area wealth managers were considered for the award; 97 (5 % of candidates) were named 2025 Five Star Wealth Managers. The following prior year statistics use this format: YEAR: # Considered, # Winners, % of candidates, Issued Date, Research Period. 2024: 1,672, 100, 6%, 5/1/24, 7/10/23 - 1/31/24; 2023: 1,490, 98, 6.5%, 5/1/23, 7/11/22 - 1/13/23; 2022: 855, 86, 10%, 5/1/22, 7/19/21 - 1/21/22; 2021: 900, 96, 11%, 5/1/21, 7/13/20 - 1/22/21; 2020: 824, 85, 10%, 4/1/20, 6/1/19 - 2/7/20; 2019: 848, 100, 12%, 4/1/19, 7/19/18 - 2/11/19; 2018: 814, 94, 12%, 4/1/18, 7/21/17 - 2/13/18; 2017: 902, 217, 24%, 4/1/17, 7/25/16 - 2/15/17; 2016: 811, 223, 27%, 3/1/17, 9/16/15 - 2/12/16; 2015: 1107, 224, 20%, 4/1/15, 9/16/14 - 2/12/15; 2014: 1558, 190, 12%, 4/1/14, 9/16/13 - 2/12/14; 2013: 2551, 330, 13%, 4/1/13, 9/16/12 - 2/12/13; 2012: 1454, 260, 18%, 4/1/12, 9/16/11 - 2/12/12.

Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. The award is based on 10 objective criteria. Eligibility criteria – required: 1. Credentialed as a registered investment adviser (RIA) or a registered investment adviser representative; 2. Actively licensed as a RIA or as a principal of a registered investment adviser firm for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by FSP, the wealth manager has not; A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three settled or pending complaints filed against them and/or a total of five settled, pending, dismissed or denied complaints with any regulatory authority or FSP's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through FSP's consumer complaint process; feedback may not be representative of any one client's experience; C. Individually contributed to a financial settlement of a customer complaint; D. Filed for personal bankruptcy within the past 11 years; E. Been terminated from a financial services firm within the past 11 years; F. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients. Evaluation criteria – considered: 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. FSP does not evaluate quality of services provided to clients. The award is not indicative of the wealth manager's future performance. Wealth managers may or may not use discretion in their practice and therefore may not manage their clients' assets. The inclusion of a wealth manager on the Five Star Wealth Manager list should not be construed as an endorsement of the wealth manager by FSP or this publication. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by FSP in the future. Visit www.fivestarprofessional.com.