

Sugar Creek Wealth Management Group of Wells Fargo Advisors named as one of Forbes' 2024 Best-in-State Wealth Management Teams.

SUGAR LAND, TX – January 25, 2024 – Sugar Creek Wealth Management Group of Wells Fargo Advisors in Sugar Land, Texas has been recognized on the 2024 Best-in-State Wealth Management Teams list by Forbes. Financial Advisors in this team include Kris Cobb, Managing Director - Investments, William Hawker, Managing Director – Investments, Nitin Kapadia, Vice President – Investments, and Marco Lloyd, Senior Vice President – Branch Manager.

This accolade represents a list of wealth management teams who come to work with one goal on their minds – helping their clients succeed.

“It’s an honor to be recognized by Forbes as one of the 2024 Best-in-State Wealth Management Teams” said Marco Lloyd. “As investment planning has become more complex, our top priority is to work with our clients to develop strategies to help give them confidence around all facets of their financial lives and achieve their short- and long-term investment goals.”

The Forbes Best-in-State Wealth Management Teams rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

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