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LifeTime Asset & Tax Management Honored in Forbes Best-In-State Wealth Management Teams in 2025

RALEIGH, NC (January 30, 2025) LifeTime Asset & Tax Management, a provider of financial services, headquartered in the Raleigh area, is proud to be named to Forbes list of Best-In-State Wealth Management Teams for 2025. The list is published on Forbes Best-In-State Wealth Management Teams.

According to Forbes, a leading financial publication, the ranking reflects a close examination of the entire team, from its purpose, not just the mission, to its culture and skillset. Forbes takes a close look at leadership and the senior advisors since they tend to dictate every client's experience from the top down. List makers are determined based on an algorithm of qualitative and quantitative criteria, including interviews, the team's best practices, including service models, investing process, team constructs, skill set and more. The algorithm also weighs factors like revenue trends, assets under management, compliance records.

"We are pleased to have been named to this prestigious list. This is a recognition that speaks to our firm's commitment to excellence," said Matt Glova, CEO of LifeTime Asset & Tax Management. "I am grateful for the trust our clients place in us, and we remain committed to providing the guidance and support they need to achieve their unique financial goals."

About LifeTime Asset & Tax Management

LifeTime Asset & Tax Management helps clients by simplifying wealth management and investment complexities, aggregating every aspect of their finances and clarifying their goals and choices. LifeTime's wealth consultants are CERTIFIED FINANCIAL PLANNER® professionals, having met the highest educational standard in the financial planning industry. LifeTime currently includes 11 CFP® practitioners and 90 years of combined experience in the financial field. The firm is also backed by an independent broker/dealer, Commonwealth Financial Network®, meaning they are independent — LifeTime Asset's Wealth Consultants are free to act in clients' best interest, with no pressure to promote a certain product or strategy. LifeTime added a tax department to the firm in 2020. Our tax team provides tax return preparation and bookkeeping services. Our asset and tax teams work together to provide the distinct offering of strategic tax planning with wealth management. Learn more at www.lifetimeasset.com.

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***2025 Forbes Best-In-State Wealth Management Teams**, created by SHOOK Research. Presented on January 9, 2025 based on data as of March 31, 2024. 11,674 team nominations were received, more than 5,300 teams were recognized. Advisors pay a fee to hold out marketing materials. Not indicative of advisor's future performance. Your experience may vary. Click here for more award information.*

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