Mayflower Advisors Celebrates 15-Year Milestone
With Recent Independent RIA Launch

Boston, MA, December 2, 2020—Mayflower Advisors, a boutique investment and financial advisory practice with $3.75 billion in assets under management, is proud to celebrate 15 years of partnership and collaboration—marking the milestone as a recently launched independent registered investment advisor.

This strategic shift to a fiduciary approach affirms Mayflower Advisors' autonomy and positions the firm to best meet clients' evolving financial needs with a flexible, scalable infrastructure and custom planning solutions. Built on a solid foundation of experience, independence and innovation, co-founders and managing partners Lawrence Glazer, Steven Dimitriou and Lloyd Glazer lead the 35-person group, which was previously with Wells Fargo Advisors Financial Network (FiNet). Lloyd Glazer commented, "Steve, Larry and I have worked together since 1999 and opened our first office back in 2002. Mayflower Advisors has always been rooted in relationships. We view this Mayflower team and our three generations of clients as family, and it's a privilege to help our clients meet their long-term goals—in both good times and challenging ones like we've seen this past year."

To further optimize client experience, the Boston-based practice recently released the Mayflower Advisors' App. This customizable mobile interface offers streamlined access, via 128-bit encryption, for all account data: managed portfolio activity and balances, linked outside accounts, interactive and historic performance reporting, personal vault storage archive and more. The firm also launched a redesigned Website to better reflect Mayflower's client-centric, entrepreneurial culture; team-based service model and commitment to community outreach.

While these digital resources enhance Mayflower Advisors' high-touch service model, Larry Glazer emphasized, "Mayflower has always embraced technical innovation, but we know that all the technology in the world doesn't replace experience. Our principals combine for more than 150 years of hands-on advisory guidance successfully stewarding investment needs." Glazer added, "With nearly 100 industry certifications, designations and advanced credentials and 15 dedicated product experts on our team, Mayflower Advisors pairs decades of invaluable history and expertise with innovation and the best technology available."

Mayflower's private wealth management and retirement plan advisors have been recognized by *Forbes* as "Best-in-State Wealth Advisors"[1] and *Financial Times* as "Top Financial Advisers"[2] (FT 401) for the past three and six consecutive years, respectively. *The Best and Brightest Programs* recently included the firm on its 2020 list of *Boston's Best and Brightest Companies to Work For*®[3], and the National Association of Plan Advisors, an affiliate organization of the American Retirement Association, named Mayflower Advisors' plan sponsor consulting group on its national ranking of top defined contribution advisors ("Top DC Advisor Teams")[4] the past three consecutive years.

"It's gratifying to see our group recognized for its steadfast commitment to providing uncompromised guidance—through all market environments," said Steven Dimitriou. "As we celebrate this milestone, I can't help but reflect on what our team has already accomplished. And we know that the best is yet to come: Our recent RIA launch and investment in upgraded technology infrastructure reaffirms our commitment to ensure that Mayflower Advisors can continue to grow and offer clients long-term stability for generations to come."

In connection with its registered investment advisor launch, Mayflower Advisors selected BNY Mellon's Pershing ("Pershing") as primary custodian and broker-dealer for advisory assets based on its track record of stability, security, innovation and high-touch service solutions. Pershing's expertise and strong balance sheet complement Mayflower Advisors' rich client experience and will bolster its expansion as an independent registered investment advisor. To further address the increasing need for greater flexibility to leverage all that the marketplace has to offer, Mayflower Advisors' wealth managers now affiliate independently with Private Client Services as broker-dealer and will also offer the opportunity to work with other leading custodians. Additionally, the practice partnered with Fusion Financial Partners for technology and operations infrastructure, capital solutions and insurance solutions.

About Mayflower Advisors

Mayflower Advisors is an independent registered investment advisor that offers private wealth management, retirement plan consulting and foundation/endowment advisory services. The Boston-based team has partnered with three generations of clients to help meet long-term financial goals with its flexible, scalable infrastructure and custom planning solutions. Mayflower Advisors embraces a client-centric, entrepreneurial culture that promotes stability, accountability and teamwork. For more information on Mayflower Advisors' financial solutions, visit www.mayfloweradvisors.com. Media requests should be directed to brandy.chetsas@mayfloweradvisors.com.

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[1] *Forbes* included advisors from the Mayflower team on its Best in State Wealth Advisors list 2018-2020. *Forbes* created and conducted the survey for the Forbes Best in State Wealth Advisors. Award nominees are identified by ranking algorithm is based on industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. In 2018, 25,732 candidates were considered for the award and more than 2,000 candidates received the award (approximately 8%). In 2019, 6,389 candidates were considered for the award and 250 candidates received the award (approximately 4%). In 2020, 32,000 candidates were considered for the award and more than 4,000 candidates received the award (approximately 13%).

[2] Steve Dimitriou was included on *Financial Times*' Top Financial Advisors (FT 401) ranking from 2015-2020. *Financial Times* created the Top Financial Advisors (FT 401) survey; *Financial Times* and Ignites Research contacted large U.S. brokerages, independent advisors and other wealth managers to identify qualified applicants. Broadridge Financial Solutions provided data that helped to identify candidates specializing in serving companies sponsoring DC plans, including 401(k) plans and other DC accounts. To qualify for the list, advisors must have 20% or more of their total client assets in DC plans. Qualified advisors are identified and evaluated by Ignites Research using a ranking algorithm based on seven broad factors: DC assets under management, growth in DC plans and assets, degree of specialization in the DC business, experience, participation rate in DC plans advised, industry certification and compliance record. In 2018, a total of 600 advisors applied for the award, of which 401 were selected (67%). In 2019, a total of 678 advisors applied for the award, of which 401 were selected (59%). In 2020, a total of 855 advisors applied for the award, of which 401 were selected (47%).

[3] Mayflower Advisors was included on the 2020 list of *Boston's Best and Brightest Companies to Work For®*. On behalf of Best and Brightest Programs, an independent research firm evaluates participants in various categories that include human-resources related attributes, community initiatives, strategic company performance and more. Only companies that choose to voluntarily participate are considered for recognition, and participating companies are benchmarked against local and national participants. Best and Brightest does not disclose details about the total number of candidates and recipients of this award.

[4] In 2017-2019, the National Association of Plan Advisors (NAPA), an affiliate organization of the American Retirement Association, included Mayflower Advisors on its national list of top defined contribution (DC) advisor teams. "Top DC Advisor Teams" are ranked by self-reported DC assets under advisement (AUA), AUA threshold of $100 million. In 2017, approximately 300 submissions were received and 275 were selected (92%). In 2018, approximately 279 submissions were received and 257 were selected (92%). In 2019, approximately 282 submissions were received and 265 were selected (94%). The full list of NAPA's Top DC Advisor Teams is available online at https://www.napa-net.org/industryintel/accolades/top-dc-advisor-teams.

Awards and recognitions referenced herein evaluate neither client experience nor previous investment performance and are not indicative of future performance. Awards and rankings are generally based on information submitted by the participating firms. Mayflower Advisors does not pay a fee to participate in exchange for any of the awards referenced above.