FIVE STAR
WEALTH MANAGER

At Five Star Professional, our passion is to define and promote professional excellence. To that end, we speak with tens of thousands of top professionals across the country each year, learning about the work they do and what makes a wealth manager truly stand out.

Announced in *Chicago* magazine, Five Star Wealth Manager award winners are an exclusive group of Chicago-area professionals who exhibit industry expertise.

The award is based on a rigorous research methodology, which incorporates input from both peers and industry leaders. Award candidates are evaluated on 10 objective criteria, such as industry experience, number of households served, client assets, client retention rates, education and professional designations, and regulatory and complaint history.

To review the full research methodology, visit www.fivestarprofessional.com.

FIVE STAR
PROFESSIONAL

Peter M. Babilla, CFP® CRPS®

Wealth Consultant

2020 FIVE STAR WEALTH MANAGER

Award winner announced in
***Chicago* magazine**

FIVE STAR PROFESSIONAL

Peter M. Babilla, CFP® CRPS®

Wealth Consultant

WINNER OF THE 2020 FIVE STAR WEALTH MANAGER AWARD!

NINE-YEAR WINNER

2012 • 2013 • 2014 • 2015
2016 • 2017 • 2018 • 2019 • 2020

Peter M. Babilla

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Specialties and Achievements:

- 35 years in the Financial Services Industry
- Independent Advice and Solutions
- Fee-Based Financial and Retirement Planning
- Multi-Generational Wealth Planning
- Corporate Retirement Plan Design
- Series 7, 63, and 66 Securities Registrations (held with LPL Financial)
- Life and Long-term care licensed
- Certified Financial Planner™
- Chartered Retirement Plans Specialist™
- Epilepsy Foundation of Greater Chicago

I believe to pursue your financial goals you must start with a comprehensive wealth strategy based on what is important to you and your family. Whether you are in the accumulation stage, or looking at retirement and your income options, my team will develop a program focused on pursuing your goals. My clientele appreciates my 35 years of experience, and the value I can bring to the table in terms of investment solutions as they to your goals. My long-term relationships are built on trust, integrity, and the highest level of service, as my number one rule is to treat each client as I would expect to be treated.

CRPS conferred by College for Financial Planning.
Securities and advisory services offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC.

The Five Star Wealth Manager award, administered by Crescendo Business Services, LLC (dba Five Star Professional), is based on 10 objective criteria. Eligibility criteria – required: 1. Credentialed as a registered investment adviser or a registered investment adviser representative; 2. Actively licensed as a registered investment adviser 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 Five Star Professional, 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 Five Star Professional's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through Five Star Professional's consumer complaint process; feedback may not be representative of any one clients' 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. Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. Award does not evaluate quality of services provided to clients. Once awarded, wealth managers may purchase additional profile ad space or promotional products. The Five Star 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 Five Star Professional 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 Five Star Professional in the future. For more information on the Five Star award and the research/selection methodology, go to fivestarprofessional.com. 4,636 Chicago-area wealth managers were considered for the award; 356 (8% of candidates) were named 2020 Five Star Wealth Managers. 2019: 5,430 considered, 429 winners; 2018: 5,449 considered, 435 winners; 2017: 3,781 considered, 438 winners; 2016: 3,411 considered, 725 winners; 2015: 5,833 considered, 716 winners; 2014: 8,161 considered, 744 winners; 2013: 3,998 considered, 772 winners; 2012: 2,970 considered, 780 winners.