

BEST-IN-STATE WEALTH ADVISORS

Published April 8th, 2025. Data June 30th, 2024.

#109 JAMES E. DY



Main Street Wealth Management
Bedminster, New Jersey

Minimum Account Size for New Business
\$0

Team Assets (Custodied)
\$1.6B

Typical Size of Household Accounts
\$1-10M

FORBES BEST-IN-STATE WEALTH ADVISORS 2025 METHODOLOGY

Forbes America's Top Wealth Advisors and Best-in-State Wealth Advisors ranking was developed by SHOOK Research and is based on in-person, virtual, and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes: client impact, industry experience, credentials, review of compliance records, firm nominations; and quantitative criteria, such as: assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. SHOOK's research and rankings provide opinions intended to help investors choose the right financial advisor and are not indicative of future performance or representative of any one client's experience. Past performance is not an indication of future results. Neither Forbes nor SHOOK Research receive compensation in exchange for placement on the ranking. For more information, please see www.SHOOKresearch.com. SHOOK is a registered trademark of SHOOK Research, LLC. Minimum account sizes are general since it can vary depending on a range of circumstances. Advisors are judged on individual contribution but total team assets are shown, which can include one or more additional advisors.

Investment and Insurance Products: NOT FDIC Insured ► NO Bank Guarantee ► MAY Lose Value

Data provided by SHOOK® Research, LLC. Data as of 6/30/24. The Forbes rating is compiled by Shook Research and awarded annually in February based on information from a 12 month period ending September of the prior year. Eligibility is based on quantitative factors and is not necessarily related to the quality of the investment advice.

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