The Crossroads Wealth Management Group named one of Forbes 2025 Best-In-State Wealth Management Teams

Atlanta – January 9, 2025 – The Crossroads Wealth Management Group has been recognized by Forbes as a Best-In-State Wealth Management Team for 2025. This accolade recognizes teams that are setting the benchmark for best practices and consistently providing an excellent client experience.

“We are honored to be named as one of Forbes Best-In-State Wealth Management Teams. We believe this recognition is a testament to our team’s unwavering commitment to delivering personalized, strategic guidance to our clients and keeping abreast of industry trends,” said Russ Broda, Managing Principal. “We take immense pride in helping individuals and families achieve their financial goals, and being included on this prestigious list makes us grateful for the trust our clients place in us every day.”

The Crossroads Wealth Management Group, based in Atlanta, is comprised of nine team members led by Russ Broda, Managing Principal. Financial advisors Dean Andersen, Diane Taylor, and Josh Watt collectively oversee more than $582M in client assets as of March 31, 2024, with the support of Senior Registered Associate, Shin Woo, Registered Associate, Liz Scherrer, Registered Associate, Allan Kent, Registered Associate, Matthew Kelly and Senior Client Associate, Penny Brook, ensuring a well-rounded approach to client service. Together, the team has 227 combined years of experience in the financial services industry.

2025 Forbes Best in State Wealth Management Teams

2025 Forbes Best-in-State Wealth Management Teams: Awarded January 2025; Data compiled by SHOOK Research LLC based on the time period from 3/31/23 - 3/31/24 (Source: Forbes.com). 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. 11,674 wealth management teams were considered for the rating; 5,331 (45.66% percent of candidates) were named 2025 Forbes Best-in-State Wealth Management Teams.

About Wells Fargo Advisors Financial Network

For more than 20 years, Wells Fargo Advisors Financial Network, the independent contractor business model of Wells Fargo Wealth & Investment Management (WIM), has offered financial advisors more control, flexibility, and growth around business ownership as well as support from one of the nation’s largest financial institutions. WIM provides financial products and services through various bank and brokerage affiliates of Wells Fargo & Company. Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC, Member SIPC (WFAFN), a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Any other referenced entity is a separate entity from WFAFN.

PM-07132026-7524825.1.1