Awards & Recognition Disclosures

Maridea Wealth Management LLC ("Maridea") may from time to time receive or publish awards, rankings, or other recognitions ("Awards") from third parties. The following information is provided to help clients and prospective clients better understand these Awards.

General Disclosure Regarding Awards

1. May be based on criteria that vary by awarding organization
2. May involve participation in surveys or applications submitted by the firm
3. Should not be construed as an endorsement by any client or as a recommendation by any third party
4. May not be representative of the experience of all clients
5. Award recognition does not guarantee or imply any past, present, or future level of investment success or performance

Where applicable, Maridea will disclose:

1. The awarding organization
2. The year the award was granted
3. The general criteria or methodology used
4. Whether any compensation was provided in connection with the award

Questions

If you have any questions about any award or recognition referenced by Maridea, please contact us as indicated in the "Connect With Us" section of our website.

2026 Inc. Best Workplaces Honoree

Maridea was recognized as an honoree on the Inc. Best Workplaces 2026 list.

About the Award

The Inc. Best Workplaces program recognizes companies that have created exceptional workplaces and company cultures. Rankings are generally based on a combination of employee survey responses and organizational data, including factors such as employee engagement, benefits, management effectiveness, and workplace policies.

Compensation & Participation

Maridea did not provide compensation in exchange for consideration for this award. Maridea may pay a fee to license or promote the use of the Inc. Best Workplaces designation following receipt of the award. Participation in the employee survey process is voluntary, and not all companies are eligible for or participate in the ranking process.

Important Considerations

- This award is based on employee feedback and company practices
- This award is not based on, or indicative of, investment performance
- May not be representative of any client's outcomes or experiences

<u>RIA Team of the Year</u>

Maridea Wealth Management LLC was recognized as an Investment News "RIA Team of the Year" 2026 honoree.

About the Award

The Investment News awards program recognizes advisory firms based on factors such as business growth, leadership, service offerings, and overall practice excellence. The evaluation is based on information provided by applicants and/or reviewed by the awarding organization for a specified period and may not reflect longer-term results.

Not all eligible firms apply for or are considered for the award. Eligibility is generally limited to firms that choose to apply or are nominated and meet certain criteria established by Investment News; therefore, the award is not representative of all advisory firms.

Compensation & Participation

Maridea paid an application fee to be considered for this award and may pay fees to attend, promote, or license the award for marketing purposes. No compensation was provided in exchange for receiving the award or influencing its outcome.

Important Considerations

- This award is not based on, or indicative of, investment performance
- May not be representative of any client's outcomes or experiences

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<u>TOP 100 Accountants Awards 2026</u>

About the Award

David Pappota, Founder and Principal of Maridea Tax & Business Services, an affiliate of Maridea Wealth Management, LLC, was recognized in the Los Angeles Business Journal's **Top 100 Accountants** for 2023, 2024, 2025, and 2026. The Los Angeles Business Journal is an independent business publication serving the Los Angeles region. The award recognizes accounting professionals in the Los Angeles region for professional accomplishments, leadership, community involvement, and contributions to the accounting profession.

The recognitions were announced on November 8, 2023; November 7, 2024; November 6, 2025; and May 20, 2026.

Mr. Pappota was nominated for the award by California State University, Northridge (CSUN), his alma mater. He was not aware of the nominations at the time they were submitted.

Compensation & Participation

No fee was paid by Mr. Pappota, Maridea Tax & Business Services, or Maridea Wealth Management to submit a nomination, to be considered for the award, or to receive the award.

The Los Angeles Business Journal hosts an awards event in connection with its recognition. Honorees may elect to attend the event, and attendance may require payment of an admission fee. Attendance is entirely voluntary and is not a condition of nomination, selection, or receipt of the award.

Important Considerations

This recognition was awarded to Mr. Pappota in connection with his professional accounting activities and is not based on the quality or performance of investment advisory services provided by Maridea Wealth Management, LLC.

Third-party ratings and awards are not indicative of future performance and do not guarantee that any client or prospective client will experience a certain level of results or satisfaction. The award should not be construed as an endorsement by any current or former client and is not representative of any client's experience.

The award is based on criteria established by the sponsoring organization and should be evaluated independently of any investment advisory services offered by Maridea Wealth Management, LLC.

Top 50 Fastest Growing RIAs 2026

About the Award

Maridea Wealth Management, LLC was recognized as one of **Financial Advisor Magazine's 2026 Top 50 Fastest-Growing RIAs**, ranking #6 nationally. The ranking was published in Financial Advisor Magazine's 2026 RIA Survey & Ranking report. According to the published ranking, Maridea Wealth Management reported approximately $958.7 million in assets under management as of year-end 2025 and was recognized based on asset growth between 2024 and 2025.

Financial Advisor Magazine is an independent industry publication serving financial advisers and wealth management firms. The ranking is based on information submitted by participating firms and criteria established by Financial Advisor Magazine. Award/Ranking Date: 2026.

Compensation and Participation

Financial Advisor Magazine requires participating firms to provide information through its annual RIA survey. Maridea Wealth Management voluntarily provided information for consideration.

No compensation was paid to Financial Advisor Magazine for participation in the survey, consideration for the ranking, or inclusion in the Top 50 Fastest-Growing RIAs ranking.

Maridea Wealth Management did not pay any fee to be considered for or receive the ranking. The firm may have separately purchased reprints, promotional materials, logo licensing rights, or related marketing services after publication of the ranking, which were not factors in determining the ranking.

Important Considerations

The Financial Advisor Magazine Top 50 Fastest-Growing RIAs ranking is based primarily on firm asset growth and other criteria established by the publisher. The ranking is not based on investment performance, client investment returns, or the quality of investment advice provided to clients.

Third-party rankings and recognitions are not indicative of future investment performance and do not guarantee that any client or prospective client will experience a particular level of results or satisfaction.

The ranking should not be construed as an endorsement by any current or former client. No inference should be made that a client's experience with Maridea Wealth Management would be representative of the experience of any other client.