



October 7, 2024

**FOR IMMEDIATE RELEASE**

**Media Contact:** Tara Detanna, 310-285-4533  
<https://www.globalwealthsolutionsgroup.com/>

## **LISA DETANNA INDUCTED INTO BARRON'S HALL OF FAME**

**BEVERLY HILLS, CA** – Barron's Group announced that Lisa Detanna, Managing Director, Global Wealth Solutions Group of Raymond James has been officially inducted into Barron's Financial Advisors Hall of Fame, which honors a select group of advisors who exemplify long-term success and commitment to their clients.

Throughout a noteworthy career in the financial services industry, spanning more than 30 years, Detanna has established herself as a knowledgeable guide for family offices, multigenerational families, and high-net-worth clients. Getting to the heart of what clients find meaningful is her passion. She works tirelessly to facilitate the often-challenging family conversations around inheritance, estate planning and financial education, striving for a deeper level of harmony and clarity.

"Lisa's inclusion in Barron's Financial Advisors Hall of Fame should come as no surprise to anyone who has watched her career and dedication, providing the highest level of client service and advice," said Andrew Waldbaum, Complex Manager, Beverly Hills. "She really exemplifies the firm's commitment to put clients first."

Each of the 195 advisors currently honored in Barron's Hall of Fame have appeared in Barron's annual Top 100 Advisor ranking for 10+ years, an impressive feat achieved by just a tiny fraction of the top 1% of all advisors in the industry. These women and men exemplify long-term success and commitment to clients.

"Lisa has been a mentor and role model to me since I joined the team more than 15 years ago," said Wesley Scott, Financial Advisor. "Her guidance has been essential to both our clients and my own growth as a wealth management professional. Her client-first approach makes her an example for the next generation of advisors to follow."

In 2024, Detanna was included on Barron's list of both Top 100 Financial Advisors and Top 100 Women Financial Advisors, as well as Barron's Top 1,200 Financial Advisor.

"I'm humbled to be included amount this distinguished group of financial advisors," said Detanna. "I want to thank my team, who have helped me to support my clients through their financial journey over the years. This honor is as much about them as it is about me."

View the full Barron's Advisor Hall of Fame list here:  
<https://www.barrons.com/advisor/summits/hall-of-fame>

### **About Detanna**

During her tenure at the helm of Global Wealth Solutions Group of Raymond James, which has more than \$2.851 billion\* client assets, Lisa has earned the Private Wealth Advisor designation from Raymond James. The Private Wealth Advisor is a designation awarded by Raymond

James to financial advisors who have demonstrated mastery in anticipating and managing the expansive financial needs of high-net-worth individuals, families and organizations.

*Client asset total from 10/01/2024 assets – Practice Center*

Barron's Hall of Fame Award, 2024. Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved. "Barron's Hall of Fame" is an award honoring a group of advisors who exemplify long-term success and commitment to their clients. Each member of the Hall of Fame has appeared in 10 or more of Barron's annual Top 100 Advisor rankings, and their long-looking commitment to excellence is a hopeful example for the industry to follow. This award was released on 05/10/2024. The Top 100 Advisor rankings are based on data provided by individual advisors and their firms and include qualitative and quantitative criteria. Data points that relate to quality of practice include professionals with a minimum of 7 years financial services experience, acceptable compliance records (no criminal U4 issues), client retention reports, charitable and philanthropic work, quality of practice, designations held, offering services beyond investments offered including estates and trusts, and more. Financial Advisors are quantitatively rated based on varying types of revenues produced and assets under management by the financial professional, with weightings associated for each. Investment performance is not an explicit component because not all advisors have audited results and because performance figures often are influenced more by clients' risk tolerance than by an advisor's investment picking abilities. The ranking may not be representative of any one client's experience, is not an endorsement, and is not indicative of an advisor's future performance. Neither Raymond James nor any of its Financial Advisors pay a fee in exchange for this award/rating. Barron's is not affiliated with Raymond James.

2024 Barron's Top 100 Financial Advisors Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved. The rankings are based on data provided by 1,160 individual advisors and their firms and include qualitative and quantitative criteria. Data points that relate to quality of practice include professionals with a minimum of 7 years financial services experience, acceptable compliance records (no criminal U4 issues), client retention reports, charitable and philanthropic work, quality of practice, designations held, offering services beyond investments offered including estates and trusts, and more. Financial Advisors are quantitatively rated based on varying types of revenues produced and assets under management by the financial professional, with weightings associated for each. Investment performance is not an explicit component because not all advisors have audited results and because performance figures often are influenced more by clients' risk tolerance than by an advisor's investment picking abilities. This ranking is based upon the period from 1/1/23-12/31/23 and was released 05/10/2024. This ranking is not based in any way on the individual's abilities in regard to providing investment advice or management. The ranking may not be representative of any one client's experience, is not an endorsement, and is not indicative of an advisor's future performance. Neither Raymond James nor any of its Financial Advisors pay a fee in exchange for this award/rating. Barron's is not affiliated with Raymond James.

Barron's Top 100 Women Financial Advisors (2024) Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved. The rankings are based on data provided by individual advisors and their firms and include qualitative and quantitative criteria. There were a total of 1,094 applicants and data points that relate to quality of practice included professionals with a minimum of 7 years financial services experience, acceptable compliance records (no criminal U4 issues), client retention reports, charitable and philanthropic work, quality of practice, designations held, offering services beyond investments offered including estates and trusts, and more. Financial Advisors are quantitatively rated based on varying types of revenues produced and assets under management by the financial professional, with weightings associated for each. Investment performance is not an explicit component because not all advisors have audited results and because performance figures often are influenced more by clients' risk tolerance than by an advisor's investment picking abilities. This ranking is based upon the period from 03/01/2023 to 03/31/2024 and was released on 07/19/2024. The ranking may not be representative of any one client's experience, is not an endorsement, and is not indicative of an advisor's future performance. Neither Raymond James nor any of its Financial Advisors pay a fee in exchange for this award/rating. Compensation provided for using the rating. Barron's is not affiliated with Raymond James.

Barron's Top 1,200 Financial Advisors (2024) Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved. The rankings are based on data provided by 6,595 individual advisors and their firms and include qualitative and quantitative criteria. Time period upon which the rating is based is from 09/30/2022 to 09/30/2023 and was released on 03/11/2024. Factors included in the rankings: assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work. Investment performance is not an explicit component because not all advisors have audited results and because performance figures often are influenced more by clients' risk tolerance than by an advisor's investment picking abilities. The ranking may not be representative of any one client's experience, is not an endorsement, and is not indicative of advisor's future performance. Neither Raymond James nor any of its Financial Advisors pay a fee in exchange for this award/rating. Barron's is not affiliated with Raymond James.