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- **2023 *Barron’s* “Top 1,200 Financial Advisors” list**

Published on March 10, 2023. Rankings based on data as of September 30, 2022.

- **2023 *Forbes* “Best-in-State Wealth Advisors” list**

Published on April 4, 2023. Rankings based on data as of June 30, 2022.



The Purcell McLean Team

Edwin “Mac” Purcell, CPFA®

Managing Director

Senior Financial Advisor

910.486.0447

edwin_purcell@ml.com

Merrill Lynch Wealth Management

2550 Ravenhill Drive

Suite 201

Fayetteville, NC 28303

fa.ml.com/edwin_purcell

2023 *Barron’s* “Top 1,200 Financial Advisors” list. Opinions are *Barron’s* who evaluated advisors with a minimum of seven years financial services experience and employed at their current firm for at least one year. Other quantitative and qualitative measures include assets under management, quality of practice, regulatory records, internal company documents and 100-plus points of advisor-provided data. Rankings do not reflect any client experience, endorse any advisor and are available for client evaluation only. Compensation was not received from any Advisors for the study.

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