

# Carver Financial Services Achieves #2 Ranking in Ohio on Forbes' 2025 Best-In-State Wealth Management Teams List

*Randy Carver secures the #2 position on Forbes' 2025 "Best-In-State Wealth Management Teams" list for Ohio.*

MENTOR, OH, UNITED STATES, April 14, 2025 /EINPresswire.com/ -- [Randy Carver, CRPC®, CDFA®, President and Founder](#) of [Carver Financial Services](#), is proud to announce its exceptional achievement of securing the #2 position on Forbes' 2025 "Best-In-State Wealth Management Teams" list for Ohio. This prestigious recognition highlights the firm's unwavering dedication to delivering personalized financial strategies and outstanding client service.



Forbes, in collaboration with SHOOK Research, evaluates wealth management teams nationwide based on a comprehensive set of criteria, including industry experience, revenue trends, assets under management, compliance records, and best practices in client service. The 2025 rankings reflect data from March 31, 2024, to March 31, 2025.

Founded by Randy Carver, CRPC®, CDFA®, Carver Financial Services has consistently demonstrated excellence in the financial services industry. The firm's commitment to helping clients achieve their personal visions through individualized planning and a collaborative team approach has been central to its success.

Randy Carver expressed his gratitude for this honor: "This accolade is a testament to the hard work and dedication of our entire team, as well as the trust and loyalty of our clients. We remain committed to providing personalized financial strategies that align with our clients' unique goals and aspirations."

The Forbes Top Wealth Advisors Best-in-State 2025 ranking, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person

due diligence interviews, and quantitative data. This ranking is based upon the period from 6/30/2023 to 6/30/2024 and was released on 4/8/2025. Those advisors that are considered have a minimum of seven years of experience, and the algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Out of approximately 48,944 nominations, roughly 9,722 advisors received the award. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Compensation provided for using the rating. Raymond James is not affiliated with Forbes or Shook Research, LLC. Please visit <https://www.forbes.com/best-in-state-wealth-advisors/> for more info.

#### About Carver Financial Services

Founded in 1990 by Randy Carver, Carver Financial Services is a full-service financial planning firm located in Mentor, Ohio. The firm offers comprehensive wealth management services, including retirement planning, investment management, estate planning, and more, all tailored to meet the unique needs of each client. The team at Carver Financial Services is committed to providing exceptional service and building lasting relationships based on trust and integrity.

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For more information about Carver Financial Services and their services, please visit their website at [www.carverfinancialservices.com](http://www.carverfinancialservices.com).

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