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Financial Advisors with D.A. Davidson & Co. member FINRA/SIPC

#1 SOLO ADVISOR TO WATCH



Hilary Kosloske, CWS®

Senior Vice President, Financial Advisor,
Portfolio Manager
(336) 742-7054
hkosloske@dadco.com

AdvisorHub



One of the most rewarding aspects of my career is that there is always something new to learn. Whether through market insights, industry thought leadership, or conversations with fellow professionals, continuous learning helps me refine my approach and better serve the clients who place their trust in me.

That's one reason being named the #1 Solo Advisor in AdvisorHub's Advisors to Watch in 2026 ranking is especially meaningful to me. AdvisorHub is a respected industry publication that helps financial professionals stay informed on emerging trends, best practices, and leadership within the profession. This recognition reflects the growth of a practice built from the ground up over 29 years and a continued commitment to professional excellence and client service.

Each year, the Advisors to Watch ranking recognizes 1,000 advisors for their excellence and receives nominations from over 2,000 firms and advisors who demonstrate strong business growth, professionalism, and a commitment to serving their clients. The Solo Advisor category highlights advisors who work directly with clients as the primary advisor in their practice, delivering highly personalized guidance supported by their teams and firms.

More than anything, this recognition reflects the trust and relationships I've been fortunate to build with clients like you. It is a privilege to walk alongside you throughout your financial journey, and I remain deeply committed to providing the quality advice, personal attention, and dedicated service you have come to expect. Your goals remain my priority, and I look forward to continuing to serve you for years to come.

The 2026 AdvisorHub ranking of 50 Advisors to Watch Solo awarded in June of 2026 based on an evaluation period of 12/31/24 - 12/31/25. To see the complete list as well as methodology reference here: <https://www.advisorhub.com/advisors-to-watch-solo-2026/> This ranking is not based in any way on the individual's abilities in regards to providing investment advice or management. This ranking is not indicative of advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither D.A. Davidson & Co. nor the Financial Advisor pay a fee in exchange for this award/rating. D.A. Davidson & Co. is not affiliated with AdvisorHub. Participation in the ranking is open to any firm or advisor and there are no fees for participation

