

Top Independent Advisors

BARRON'S

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WHAT PRICE GROWTH?

Independent advisory firms are growing by leaps and bounds. How fast is too fast?

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The 2019 Top 100 Independent Advisors

Here are America's top independent financial advisors, as identified by *Barron's*. The ranking reflects the volume of assets overseen by the advisors and their teams, revenues generated for the firms, and the quality of the advisors' practices. The scoring system assigns a top score of 100 and rates the rest by comparing them with the top-ranked advisor. A ranking of "N" indicates the advisor wasn't ranked in the specified year. HNW=high net worth; UHNW=ultra-high net worth.

1. Spuds Powell

Kayne Anderson Rudnick Inv. Mgmt., Los Angeles

2018 Rank: 1

Client Types: HNW, UHNW, Foundations

Team Total Assets (mil): \$29,528

Typical Acct Size (mil): \$8.5

Typical Net Worth (mil): \$20

2. Charles C. Zhang

Zhang Financial, Portage, Mich.

2018 Rank: 6

Client Types: Retail, HNW, UHNW

Team Total Assets (mil): \$3,503

Typical Acct Size (mil): \$2

Typical Net Worth (mil): \$3

3. Kimberlee Orth

Ameriprise Financial, Wilmington, Del.

2018 Rank: 11

Client Types: Retail, HNW, UHNW, Institutional

Team Total Assets (mil): \$2,622

Typical Acct Size (mil): \$5.69

Typical Net Worth (mil): \$14.38

4. Stephan Cassaday

Cassaday & Company, Mclean, Va.

2018 Rank: 12

Client Types: Retail, HNW, UHNW

Team Total Assets (mil): \$3,240

Typical Acct Size (mil): \$1.5

Typical Net Worth (mil): \$2

5. Edward Cronin

Manchester Capital Mgmt., Montecito, Calif.

2018 Rank: 8

Client Types: HNW, UHNW, Foundations

Team Total Assets (mil): \$3,660

Typical Acct Size (mil): \$25

Typical Net Worth (mil): \$60

6. Richard Saperstein

Treasury Partners at HighTower, New York

2018 Rank: 10

Client Types: HNW, UHNW, Institutional

Team Total Assets (mil): \$14,857

Typical Acct Size (mil): \$20

Typical Net Worth (mil): \$25

7. Seth Finkel

Neuberger Berman, New York

2018 Rank: N

Client Types: HNW, UHNW, Institutional

Team Total Assets (mil): \$2,966

Typical Acct Size (mil): \$10

Typical Net Worth (mil): \$20

8. Steven Hefter

HLM Capital, Highland Park, Ill.

2018 Rank: N

Client Types: HNW, UHNW

Team Total Assets (mil): \$5,768

Typical Acct Size (mil): \$15

Typical Net Worth (mil): \$20

9. Valerie Newell

Mariner Wealth Advisors, Cincinnati

2018 Rank: 15

Client Types: Retail, HNW, UHNW

Team Total Assets (mil): \$3,168

Typical Acct Size (mil): \$3

Typical Net Worth (mil): \$7.5

10. Stephanie J. Stiefel

Neuberger Berman, New York

2018 Rank: N

Client Types: HNW, UHNW, Institutional

Team Total Assets (mil): \$2,613

Typical Acct Size (mil): \$15

Typical Net Worth (mil): \$45

11. Jon Goldstein

First Republic Investment Mgmt., Palo Alto, Calif.

2018 Rank: 7

Client Types: HNW, UHNW

Team Total Assets (mil): \$5,140

Typical Acct Size (mil): \$50

Typical Net Worth (mil): \$100

12. Erik Morgan

Freestone Capital Mgmt., Seattle

2018 Rank: 18

Client Types: HNW, UHNW

Team Total Assets (mil): \$4,680

Typical Acct Size (mil): \$4.41

Typical Net Worth (mil): \$8.31

13. Thomas Moran

Moran Wealth Mgmt., Naples, Fla.

2018 Rank: N

Client Types: Retail, HNW, UHNW, Institutional

Team Total Assets (mil): \$3,484

Typical Acct Size (mil): \$5

Typical Net Worth (mil): \$25

14. Paul Tramontano

First Republic Investment Mgmt., Greenwich, Conn.

2018 Rank: 17

Client Types: UHNW, Foundations

Team Total Assets (mil): \$3,168

Typical Acct Size (mil): \$40

Typical Net Worth (mil): \$100

15. Richard Joyner

Tolleson Wealth Management, Dallas

2018 Rank: 19

Client Types: HNW, UHNW, Foundations

Team Total Assets (mil): \$6,190

Typical Acct Size (mil): \$40

Typical Net Worth (mil): \$87

16. David Kudla

Mainstay Capital Management, Grand Blanc, Mich.

2018 Rank: 20

Client Types: Retail, HNW, UHNW, Institutional

Team Total Assets (mil): \$2,566

Typical Acct Size (mil): \$0.75

Typical Net Worth (mil): \$3

17. John Krambeer

Camden Capital, El Segundo, Calif.

2018 Rank: 41

Client Types: Retail, HNW, UHNW, Foundations

Team Total Assets (mil): \$4,579

Typical Acct Size (mil): \$15

Typical Net Worth (mil): \$50

18. Dagny Maidman

First Republic Investment Mgmt., San Francisco

2018 Rank: 29

Client Types: HNW, UHNW

Team Total Assets (mil): \$2,800

Typical Acct Size (mil): \$50

Typical Net Worth (mil): \$500

19. Kevin Grimes

Grimes & Company, Westborough, Mass.

2018 Rank: 25

Client Types: Retail, HNW, UHNW

Team Total Assets (mil): \$2,646

Typical Acct Size (mil): \$3

Typical Net Worth (mil): \$10

20. Dale Yahnke

Dowling & Yahnke, San Diego

2018 Rank: 27

Client Types: HNW, UHNW

Team Total Assets (mil): \$4,356

Typical Acct Size (mil): \$4.16

Typical Net Worth (mil): \$30

21. William Peterson

Neuberger Berman, New York

2018 Rank: N

Client Types: HNW, UHNW

Team Total Assets (mil): \$1,814

Typical Acct Size (mil): \$6.5

Typical Net Worth (mil): \$13

22. Susan Kaplan

Kaplan Financial Svcs., Newton, Mass.

2018 Rank: 26

Client Types: HNW, UHNW

Team Total Assets (mil): \$2,051

Typical Acct Size (mil): \$3.5

Typical Net Worth (mil): \$11

23. Jon Jones

Brighton Jones, Seattle

2018 Rank: 32

Client Types: Retail, HNW, UHNW

Team Total Assets (mil): \$6,127

Typical Acct Size (mil): \$3

Typical Net Worth (mil): \$5

24. Robert Balentine

Balentine, Atlanta

2018 Rank: 24

Client Types: HNW, UHNW, Foundations, Institutional

Team Total Assets (mil): \$3,120

Typical Acct Size (mil): \$17.43

Typical Net Worth (mil): \$25

25. Charles Brighton

Brighton Jones, Seattle

2018 Rank: 31

Client Types: Retail, HNW, UHNW

Team Total Assets (mil): \$6,127

Typical Acct Size (mil): \$3

Typical Net Worth (mil): \$5

26. Steven Weinstein

Altair Advisers, Chicago

2018 Rank: 28

Client Types: HNW, UHNW

Team Total Assets (mil): \$4,902

Typical Acct Size (mil): \$15

Typical Net Worth (mil): \$30

27. Daniel Wiener

Adviser Investments, Newton, Mass.

2018 Rank: 30

Client Types: Retail, HNW, UHNW

Team Total Assets (mil): \$5,974

Typical Acct Size (mil): \$1.49

Typical Net Worth (mil): \$2.5

28. David Mabie

Chicago Capital, Chicago

2018 Rank: N

Client Types: HNW, UHNW

Team Total Assets (mil): \$1,901

Typical Acct Size (mil): \$5

Typical Net Worth (mil): \$5

29. Holly Newman Kroft

Neuberger Berman, New York

2018 Rank: N

Client Types: HNW, UHNW, Endowments

Team Total Assets (mil): \$1,770

Typical Acct Size (mil): \$7

Typical Net Worth (mil): \$15

30. Grant Rawdin

Wescott Financial Advisory Group, Philadelphia

2018 Rank: 35

Client Types: Retail, HNW, UHNW, Foundations, Institutional

Team Total Assets (mil): \$2,223

Typical Acct Size (mil): \$8

Typical Net Worth (mil): \$22

31. Brenna Saunders

Creative Planning, Overland Park, Kan.

2018 Rank: 54

Client Types: HNW, UHNW

Team Total Assets (mil): \$1,918

Typical Acct Size (mil): \$2.97

Typical Net Worth (mil): \$13.03

32. Virginia Guy

Neuberger Berman Investment Advisers, New York

2018 Rank: N

Client Types: HNW, UHNW, Foundations

Team Total Assets (mil): \$1,420

Typical Acct Size (mil): \$7

Typical Net Worth (mil): \$20

33. Frank Marzano

GM Advisory Group, Melville, N.Y.

2018 Rank: 59

Client Types: Retail, HNW, UHNW

Team Total Assets (mil): \$2,140

Typical Acct Size (mil): \$20

Typical Net Worth (mil): \$30

34. Frank Reilly

Reilly Financial Advisors, La Mesa, Calif.

2018 Rank: 40

Client Types: Retail, HNW, Institutional

Team Total Assets (mil): \$2,257

Typical Acct Size (mil): \$2

Typical Net Worth (mil): \$6

35. Randall Linde*AGP Wealth Advisors, Renton, Wash.***2018 Rank:** 49**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$2,082**Typical Acct Size** (mil): \$0.88**Typical Net Worth** (mil): \$2.5**36. Paul West***Carson Wealth Management Group, Omaha, Neb.***2018 Rank:** 57**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$5,403**Typical Acct Size** (mil): \$5**Typical Net Worth** (mil): \$10**37. Jeffrey Grinspoon***VWG Wealth Management at HighTower, Vienna, Va.***2018 Rank:** 63**Client Types:** HNW, UHNW, Institutional**Team Total Assets** (mil): \$2,120**Typical Acct Size** (mil): \$5**Typical Net Worth** (mil): \$7**38. Gerard Klingman***Klingman & Associates/Raymond James, New York***2018 Rank:** 46**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$2,336**Typical Acct Size** (mil): \$10**Typical Net Worth** (mil): \$15**39. James B. Stack***Stack Financial Management, Whitefish, Mont.***2018 Rank:** 43**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,311**Typical Acct Size** (mil): \$1.5**Typical Net Worth** (mil): \$5**40. Laila Pence***Pence Wealth Management, Newport Beach, Calif.***2018 Rank:** 38**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,738**Typical Acct Size** (mil): \$2**Typical Net Worth** (mil): \$5**41. Gary Ran***Telemus Capital, Southfield, Mich.***2018 Rank:** 50**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$2,810**Typical Acct Size** (mil): \$2.64**Typical Net Worth** (mil): \$8**42. Glenn Degenars***First Republic Investment Mgmt., New York***2018 Rank:** 76**Client Types:** HNW, UHNW, Endowments, Institutional**Team Total Assets** (mil): \$1,854**Typical Acct Size** (mil): \$20**Typical Net Worth** (mil): \$37.5**43. Alex Shahidi***Advanced Research Inv. Solutions (ARIS), Los Angeles***2018 Rank:** 44**Client Types:** UHNW, Foundations, Institutional**Team Total Assets** (mil): \$11,372**Typical Acct Size** (mil): \$20**Typical Net Worth** (mil): \$25**44. Jonathan Kuttin***Kuttin Wealth Mgmt., Hauppauge, N.Y.***2018 Rank:** 51**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,944**Typical Acct Size** (mil): \$1**Typical Net Worth** (mil): \$3.9**45. Molly Rothove***Creative Planning, Overland Park, Kan.***2018 Rank:** 62**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$1,379**Typical Acct Size** (mil): \$1.51**Typical Net Worth** (mil): \$7.44**46. Richard S. Brown***JNBA Financial Advisors, Minneapolis James, New York***2018 Rank:** 47**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,518**Typical Acct Size** (mil): \$1.5**Typical Net Worth** (mil): \$2**47. John Henry***OBS Financial, Perrysburg, Ohio***2018 Rank:** 45**Client Types:** Retail, HNW, Institutional**Team Total Assets** (mil): \$1,950**Typical Acct Size** (mil): \$0.13**Typical Net Worth** (mil): \$0.19**48. Daniel Roe***Budros, Ruhlman & Roe, Columbus, Ohio***2018 Rank:** 55**Client Types:** HNW, UHNW, Institutional**Team Total Assets** (mil): \$2,808**Typical Acct Size** (mil): \$4.8**Typical Net Worth** (mil): \$6**49. Randy Carver***Raymond James, Mentor, Ohio***2018 Rank:** 61**Client Types:** Retail, HNW**Team Total Assets** (mil): \$1,581**Typical Acct Size** (mil): \$1**Typical Net Worth** (mil): \$1.4**50. Shawn Parker***Ameriprise Financial, Schaumburg, Ill.***2018 Rank:** 64**Client Types:** Retail, HNW, UHNW, Institutional**Team Total Assets** (mil): \$2,250**Typical Acct Size** (mil): \$2.75**Typical Net Worth** (mil): \$5**51. Andy Berg***Homrich Berg, Atlanta***2018 Rank:** 78**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$6,109**Typical Acct Size** (mil): \$3.5**Typical Net Worth** (mil): \$7**52. Jim Berliner***Westmount Asset Mgmt., Los Angeles***2018 Rank:** N**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$3,358**Typical Acct Size** (mil): \$3.5**Typical Net Worth** (mil): \$9**53. Charles Simmons***Ameriprise Financial, Metairie, La.***2018 Rank:** 52**Client Types:** Retail, HNW**Team Total Assets** (mil): \$2,625**Typical Acct Size** (mil): \$0.75**Typical Net Worth** (mil): \$1.8**54. Stewart Mather***The Mather Group, Chicago***2018 Rank:** 85**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$4,305**Typical Acct Size** (mil): \$25**Typical Net Worth** (mil): \$35**55. Kevin Myeroff***NCA Financial Planners, Cleveland, Ohio***2018 Rank:** 53**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,749**Typical Acct Size** (mil): \$2.5**Typical Net Worth** (mil): \$3**56. Lewis Altfest***Altfest Personal Wealth Mgmt., New York***2018 Rank:** 65**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,340**Typical Acct Size** (mil): \$2**Typical Net Worth** (mil): \$5**57. Jeffrey Fratarcangeli***Fratarcangeli Wealth Mgmt., Birmingham, Mich.***2018 Rank:** N**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,750**Typical Acct Size** (mil): \$5**Typical Net Worth** (mil): \$15**58. Thomas Myers***Bordeaux Wealth Advisors, Menlo Park, Calif.***2018 Rank:** 56**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$2,272**Typical Acct Size** (mil): \$20**Typical Net Worth** (mil): \$30**59. Keith Webster***First Republic Investment Management, Los Angeles***2018 Rank:** N**Client Types:** HNW, UHNW, Foundations**Team Total Assets** (mil): \$1,940**Typical Acct Size** (mil): \$10**Typical Net Worth** (mil): \$20**60. Jordan Waxman***HSW Advisors at HighTower, New York***2018 Rank:** 58**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$2,130**Typical Acct Size** (mil): \$25**Typical Net Worth** (mil): \$50**61. Lawrence Hood***Pacific Portfolio Consulting, Seattle***2018 Rank:** 68**Client Types:** Retail, HNW, UHNW, Institutional**Team Total Assets** (mil): \$3,796**Typical Acct Size** (mil): \$10**Typical Net Worth** (mil): \$18**62. Michael Chasnoff***Truepoint Wealth Counsel, Cincinnati***2018 Rank:** 70**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$3,119**Typical Acct Size** (mil): \$3**Typical Net Worth** (mil): \$8**63. Charles Bean***Heritage Financial Services, Westwood, Mass.***2018 Rank:** 60**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,521**Typical Acct Size** (mil): \$3**Typical Net Worth** (mil): \$5**64. Darrell Pennington***Pennington Wealth Mgmt., Houston***2018 Rank:** 91**Client Types:** Retail, HNW**Team Total Assets** (mil): \$1,255**Typical Acct Size** (mil): \$1.5**Typical Net Worth** (mil): \$2.5**65. Wes Moss***Capital Investment Advisors, Atlanta***2018 Rank:** N**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$2,561**Typical Acct Size** (mil): \$1.5**Typical Net Worth** (mil): \$2.5**66. Van Percy***Van Percy's Wealth Services Team/ Raymond James, Midland, Texas***2018 Rank:** 90**Client Types:** Retail, HNW, UHNW, Institutional**Team Total Assets** (mil): \$1,848**Typical Acct Size** (mil): \$3**Typical Net Worth** (mil): \$10**67. Scott Tiras***Tiras Wealth Management, Houston***2018 Rank:** 83**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$2,203**Typical Acct Size** (mil): \$4**Typical Net Worth** (mil): \$5**68. Erin Scannell***Ameriprise Financial, Mercer Island, Wash.***2018 Rank:** 67**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$2,144**Typical Acct Size** (mil): \$0.5**Typical Net Worth** (mil): \$3**69. Ryan Swartz***Creative Planning, Omaha, Neb.***2018 Rank:** 77**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,968**Typical Acct Size** (mil): \$0.7**Typical Net Worth** (mil): \$2.48**70. Mark Delfino***HoyleCohen, San Diego***2018 Rank:** 72**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$2,015**Typical Acct Size** (mil): \$2**Typical Net Worth** (mil): \$7**71. Randy Peterson***First Republic Investment Management, San Francisco***2018 Rank:** 87**Client Types:** Retail, HNW, UHNW, Institutional**Team Total Assets** (mil): \$1,433**Typical Acct Size** (mil): \$8.7**Typical Net Worth** (mil): \$15**72. Steven Check***Check Capital Management, Costa Mesa, Calif.***2018 Rank:** 69**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,459**Typical Acct Size** (mil): \$1**Typical Net Worth** (mil): \$3**73. Joseph Jacques***Jacques Financial, Rockville, Md.***2018 Rank:** 84**Client Types:** Retail, HNW**Team Total Assets** (mil): \$986**Typical Acct Size** (mil): \$0.98**Typical Net Worth** (mil): \$2.38**74. Pamela Rosenau***The Rosenau Group at HighTower, Aspen, Colo.***2018 Rank:** N**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$1,169**Typical Acct Size**

75. Mark Orgel*Orgel Wealth Mgmt., Altoona, Wis.***2018 Rank:** 80**Client Types:** Retail, HNW, UHNW, Institutional**Team Total Assets** (mil): \$4,653**Typical Acct Size** (mil): \$2.04**Typical Net Worth** (mil): \$6**76. Daniel Wilson***Ameriprise Financial, Auburndale, Mass.***2018 Rank:** N**Client Types:** Retail, HNW**Team Total Assets** (mil): \$2,155**Typical Acct Size** (mil): \$0.5**Typical Net Worth** (mil): \$5**77. Malcolm Cowen***Cornerstone Advisors Asset Mgmt., Bethlehem, Pa.***2018 Rank:** N**Client Types:** HNW, UHNW,

Foundations, Endowments,

Institutional

Team Total Assets (mil): \$5,807**Typical Acct Size** (mil): \$45**Typical Net Worth** (mil): \$70**78. Matthew Young***Richard C. Young & Co., Newport, R.I.***2018 Rank:** 86**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,103**Typical Acct Size** (mil): \$1.71**Typical Net Worth** (mil): \$5**79. Malcolm Makin***Raymond James Financial Svcs., Westerly, R.I.***2018 Rank:** 93**Client Types:** Retail, HNW**Team Total Assets** (mil): \$1,309**Typical Acct Size** (mil): \$1.5**Typical Net Worth** (mil): \$3**80. Duncan Rolph***Miracle Mile Advisors, Los Angeles***2018 Rank:** N**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,845**Typical Acct Size** (mil): \$4.2**Typical Net Worth** (mil): \$13**81. Wally Obermeyer***Obermeyer Wood Inv. Counsel, Aspen, Colo.***2018 Rank:** 79**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,600**Typical Acct Size** (mil): \$3**Typical Net Worth** (mil): \$10**82. Matthew Dillig***The Dillig Bowen Group at HighTower, Chicago***2018 Rank:** 92**Client Types:** HNW, UHNW,

Foundations

Team Total Assets (mil): \$1,600**Typical Acct Size** (mil): \$35**Typical Net Worth** (mil): \$50**83. Gail Reid***Ameriprise Financial, Glendale, Calif.***2018 Rank:** N**Client Types:** Retail, HNW,

Foundations

Team Total Assets (mil): \$1,586**Typical Acct Size** (mil): \$2.5**Typical Net Worth** (mil): \$4**84. Christopher Cordaro***RegentAtlantic, Morristown, N.J.***2018 Rank:** N**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$3,990**Typical Acct Size** (mil): \$5**Typical Net Worth** (mil): \$15**85. E. Geoffrey Sella***SPC Financial/Raymond James, Rockville, Md.***2018 Rank:** N**Client Types:** Retail, HNW**Team Total Assets** (mil): \$840**Typical Acct Size** (mil): \$0.84**Typical Net Worth** (mil): \$1.58**86. Leo Marzen***Bridgewater Advisors, New York***2018 Rank:** 95**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$1,530**Typical Acct Size** (mil): \$5**Typical Net Worth** (mil): \$7.5**87. Ken Moraif***Retirement Planners of America, Plano, Texas***2018 Rank:** 33**Client Types:** Retail, HNW**Team Total Assets** (mil): \$4,600**Typical Acct Size** (mil): \$2**Typical Net Worth** (mil): \$2.7**88. Sam Schoner***First Republic Inv. Mgmt., San Francisco***2018 Rank:** N**Client Types:** HNW, UHNW,

Endowments, Institutional

Team Total Assets (mil): \$1,814**Typical Acct Size** (mil): \$5**Typical Net Worth** (mil): \$10**89. Walter "JR" Gondeck***The Lerner Group at HighTower, Deerfield, Ill.***2018 Rank:** 89**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,500**Typical Acct Size** (mil): \$5**Typical Net Worth** (mil): \$10**90. James Meredith***Hefren-Tillotson, Pittsburgh, Pa.***2018 Rank:** 97**Client Types:** Retail, HNW, UHNW,

Institutional

Team Total Assets (mil): \$1,720**Typical Acct Size** (mil): \$2**Typical Net Worth** (mil): \$5.5**91. Diane Compardo***Moneta, Clayton, Mo.***2018 Rank:** N**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$1,646**Typical Acct Size** (mil): \$15**Typical Net Worth** (mil): \$18**92. Deb Wetherby***Wetherby Asset Mgmt., San Francisco***2018 Rank:** 98**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$5,306**Typical Acct Size** (mil): \$32.82**Typical Net Worth** (mil): \$45**93. Jason Babb***First Republic Inv. Mgmt., New York***2018 Rank:** N**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,064**Typical Acct Size** (mil): \$5**Typical Net Worth** (mil): \$5**94. William Cafero***RCL Advisors, New York***2018 Rank:** 73**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$2,114**Typical Acct Size** (mil): \$10**Typical Net Worth** (mil): \$23**95. Ronald Weiner***RDM Financial Group at HighTower, Westport, Conn.***2018 Rank:** N**Client Types:** Retail, HNW, UHNW,

Institutional

Team Total Assets (mil): \$876**Typical Acct Size** (mil): \$3.5**Typical Net Worth** (mil): \$7**96. David Bahnsen***The Bahnsen Group at HighTower, Newport Beach, Calif.***2018 Rank:** 100**Client Types:** Retail, HNW, UHNW,

Institutional

Team Total Assets (mil): \$1,730**Typical Acct Size** (mil): \$7.5**Typical Net Worth** (mil): \$10**97. Randy Garcia***The Investment Counsel Company, Las Vegas***2018 Rank:** N**Client Types:** Retail, HNW, UHNW,

Institutional

Team Total Assets (mil): \$1,212**Typical Acct Size** (mil): \$4.9**Typical Net Worth** (mil): \$10**98. Dalal Salomon***Salomon & Ludwin, Richmond, Va.***2018 Rank:** N**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,110**Typical Acct Size** (mil): \$4**Typical Net Worth** (mil): \$7**99. Jay Beebe***Creative Planning, Overland Park, Kan.***2018 Rank:** N**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$937**Typical Acct Size** (mil): \$0.73**Typical Net Worth** (mil): \$2.44**100. Jessica Culpepper***Creative Planning, Overland Park, Kan.***2018 Rank:** 75**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$1,131**Typical Acct Size** (mil): \$1.86**Typical Net Worth** (mil): \$11.23

N=Not Ranked Note: For more information on *Barron's* Top Advisors, contact Matt Barthel at matthew.barthel@barrons.com. *Barron's* publishes four individual financial advisor rankings each year: The Top 100, The Top 100 Women, The Top 100 Independents, and the Top 1,200, which is a state-by-state list. The process of being ranked in *Barron's* starts with filling out a detailed online survey. For information about our nominations process and the online survey, please contact Jennifer Pedone, manager of FA Research: Jennifer.Pedone@barrons.com.

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