

2019 TOP 100 WOMEN ADVISORS

# BARRON'S

June 10, 2019



## **BOXED IN**

Our annual Top 100 Women Financial Advisors ranking showcases the very best. Why females are still just 20% of an industry that clearly needs their help.

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# 2019 Top 100 Women Financial Advisors

Here are America's top women 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 was not ranked in the specified year. The Total Assets figure for each advisor denotes her team's assets.

## 1. Karen McDonald

*Morgan Stanley WM, Palo Alto*  
**2018 Rank:** 1  
**Client Types:** Retail, HNW, UHNW, Institutional  
**Total Assets (mil):** \$75,003  
**Typical Acct Size (mil):** \$3  
**Typical Net Worth (mil):** \$10

## 2. Kimberlee Orth

*Ameriprise Financial Services, Wilmington, Del.*  
**2018 Rank:** 2  
**Client Types:** Retail, HNW, UHNW, Institutional  
**Total Assets (mil):** \$2,571  
**Typical Acct Size (mil):** \$5.58  
**Typical Net Worth (mil):** \$14.1

## 3. Stephanie Stiefel

*Neuberger Berman, New York*  
**2018 Rank:** 4  
**Client Types:** HNW, UHNW, Institutional  
**Total Assets (mil):** \$2,585  
**Typical Acct Size (mil):** \$15  
**Typical Net Worth (mil):** \$45

## 4. Valerie Newell

*Mariner Wealth Advisors, Cincinnati*  
**2018 Rank:** 3  
**Client Types:** Retail, HNW, UHNW  
**Total Assets (mil):** \$3,088  
**Typical Acct Size (mil):** \$3.3  
**Typical Net Worth (mil):** \$7.5

## 5. Gillian Yu

*Morgan Stanley PWM, San Francisco*  
**2018 Rank:** 22  
**Client Types:** UHNW  
**Total Assets (mil):** \$5,846  
**Typical Acct Size (mil):** \$50  
**Typical Net Worth (mil):** \$100

## 6. Johanna Walters

*Merrill Lynch WM, Blue Bell, Pa.*  
**2018 Rank:** N  
**Client Types:** Retail, HNW, UHNW  
**Total Assets (mil):** \$7,087  
**Typical Acct Size (mil):** \$5  
**Typical Net Worth (mil):** \$10

## 7. Deborah Montaperto

*Morgan Stanley PWM, New York*  
**2018 Rank:** 13  
**Client Types:** HNW, UHNW, Foundations  
**Total Assets (mil):** \$16,445  
**Typical Acct Size (mil):** \$50  
**Typical Net Worth (mil):** \$150

## 8. Susan Kaplan

*Kaplan Financial Services, Newton, Mass.*  
**2018 Rank:** 7  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$2,030  
**Typical Acct Size (mil):** \$3.5  
**Typical Net Worth (mil):** \$11

## 9. Elaine Meyers

*J.P. Morgan Securities, San Francisco*  
**2018 Rank:** 8  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$3,200  
**Typical Acct Size (mil):** \$50  
**Typical Net Worth (mil):** \$300

## 10. Dagny Maidman

*First Republic Inv. Mgmt., San Francisco*  
**2018 Rank:** 12  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$2,200  
**Typical Acct Size (mil):** \$50  
**Typical Net Worth (mil):** \$500

## 11. Holly Newman Kroft

*Neuberger Berman, New York*  
**2018 Rank:** 10  
**Client Types:** HNW, UHNW, Endowments  
**Total Assets (mil):** \$1,770  
**Typical Acct Size (mil):** \$7  
**Typical Net Worth (mil):** \$15

## 12. Laila Pence

*Pence Wealth Mgmt., Newport Beach, Calif.*  
**2018 Rank:** 14  
**Client Types:** Retail, HNW, UHNW  
**Total Assets (mil):** \$1,894  
**Typical Acct Size (mil):** \$2  
**Typical Net Worth (mil):** \$5

## 13. Virginia Guy

*Neuberger Berman, New York*  
**2018 Rank:** 15  
**Client Types:** HNW, UHNW, Foundations  
**Total Assets (mil):** \$1,420  
**Typical Acct Size (mil):** \$7  
**Typical Net Worth (mil):** \$15

## 14. Brenna Saunders

*Creative Planning, Overland Park, Kan.*  
**2018 Rank:** N  
**Client Types:** Retail, HNW, UHNW  
**Total Assets (mil):** \$1,868  
**Typical Acct Size (mil):** \$15.7  
**Typical Net Worth (mil):** \$15.7

## 15. Mary Deatherage

*Morgan Stanley PWM, Little Falls, N.J.*  
**2018 Rank:** 16  
**Client Types:** HNW, UHNW, Foundations, Institutional  
**Total Assets (mil):** \$2,735  
**Typical Acct Size (mil):** \$10  
**Typical Net Worth (mil):** \$25

## 16. Shawn Parker

*Ameriprise Financial Services, Schaumburg, Ill.*  
**2018 Rank:** 17  
**Client Types:** Retail, HNW, UHNW, Institutional  
**Total Assets (mil):** \$2,250  
**Typical Acct Size (mil):** \$2.75  
**Typical Net Worth (mil):** \$5

## 17. Molly Rothove

*Creative Planning, Overland Park, Kan.*  
**2018 Rank:** N  
**Client Types:** Retail, HNW, UHNW  
**Total Assets (mil):** \$1,334  
**Typical Acct Size (mil):** \$9.74  
**Typical Net Worth (mil):** \$9.74

## 18. Cheryl L. Young

*Morgan Stanley WM, Los Gatos, Calif.*  
**2018 Rank:** 21  
**Client Types:** Retail, HNW, UHNW  
**Total Assets (mil):** \$1,628  
**Typical Acct Size (mil):** \$5  
**Typical Net Worth (mil):** \$15

## 19. Maureen Raihle

*Merrill PWM, Chicago*  
**2018 Rank:** 18  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$5,130  
**Typical Acct Size (mil):** \$20  
**Typical Net Worth (mil):** \$50

## 20. Valerie Houts

*Merrill Lynch WM, San Francisco*  
**2018 Rank:** 9  
**Client Types:** HNW, UHNW, Institutional  
**Total Assets (mil):** \$24,176  
**Typical Acct Size (mil):** \$55  
**Typical Net Worth (mil):** \$750

## 21. Alexandra Fuhrmann

*CIBC PWM, New York*  
**2018 Rank:** 20  
**Client Types:** HNW, UHNW, Institutional  
**Total Assets (mil):** \$6,418  
**Typical Acct Size (mil):** \$12.06  
**Typical Net Worth (mil):** \$20

## 22. Pamela Rosenau

*HighTower, Aspen, Colo.*  
**2018 Rank:** N  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$1,126  
**Typical Acct Size (mil):** \$10  
**Typical Net Worth (mil):** \$30

## 23. Jessica Culpepper

*Creative Planning, Overland Park, Kan.*  
**2018 Rank:** N  
**Client Types:** Retail, HNW, UHNW  
**Total Assets (mil):** \$1,227  
**Typical Acct Size (mil):** \$12.6  
**Typical Net Worth (mil):** \$12.6

## 24. Inna Kelly

*Morgan Stanley WM, San Francisco*  
**2018 Rank:** 23  
**Client Types:** HNW, UHNW, Institutional  
**Total Assets (mil):** \$1,386  
**Typical Acct Size (mil):** \$20  
**Typical Net Worth (mil):** \$30

## 25. Anna Winderbaum

*Morgan Stanley PWM, New York*  
**2018 Rank:** 19  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$2,320  
**Typical Acct Size (mil):** \$25  
**Typical Net Worth (mil):** \$50

## 26. Gail Reid

*Ameriprise Financial Services, Glendale, Calif.*  
**2018 Rank:** 24  
**Client Types:** Retail, HNW, Foundations  
**Total Assets (mil):** \$1,529  
**Typical Acct Size (mil):** \$2.5  
**Typical Net Worth (mil):** \$4

## 27. Louise Lane

*William Blair & Co., Chicago*  
**2018 Rank:** 25  
**Client Types:** Retail, HNW, UHNW, Foundations  
**Total Assets (mil):** \$1,059  
**Typical Acct Size (mil):** \$2.00  
**Typical Net Worth (mil):** \$6.00

## 28. Jeanie Wyatt

*South Texas Money Mgmt, San Antonio, Texas*  
**2018 Rank:** 27  
**Client Types:** Retail, HNW, UHNW, Institutional  
**Total Assets (mil):** \$3,682  
**Typical Acct Size (mil):** \$1.13  
**Typical Net Worth (mil):** \$7.56

## 29. Mary Mullin

*Merrill Lynch WM, Boston*  
**2018 Rank:** 30  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$2,306  
**Typical Acct Size (mil):** \$5  
**Typical Net Worth (mil):** \$12

## 30. Christiane Olsen

*UBS Financial Services, New York*  
**2018 Rank:** 38  
**Client Types:** Retail, HNW, UHNW  
**Total Assets (mil):** \$6,395  
**Typical Acct Size (mil):** \$7  
**Typical Net Worth (mil):** \$12

## 31. Patti Brennan

*Key Financial, West Chester, Pa.*  
**2018 Rank:** 33  
**Client Types:** Retail, HNW, UHNW  
**Total Assets (mil):** \$1,041  
**Typical Acct Size (mil):** \$2  
**Typical Net Worth (mil):** \$3

## 32. Lesley Draper

*RegentAtlantic, Morristown, N.J.*  
**2018 Rank:** N  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$4,287  
**Typical Acct Size (mil):** \$3.48  
**Typical Net Worth (mil):** \$7

## 33. Kristina Van Liew

*Morgan Stanley Graystone, Chicago*  
**2018 Rank:** 35  
**Client Types:** HNW, UHNW, Foundations, Endowments  
**Total Assets (mil):** \$6,590  
**Typical Acct Size (mil):** \$150  
**Typical Net Worth (mil):** \$100

## 34. Linda Stephans

*Morgan Stanley Graystone, Chicago*  
**2018 Rank:** 34  
**Client Types:** HNW, UHNW, Foundations, Endowments  
**Total Assets (mil):** \$6,593  
**Typical Acct Size (mil):** \$150  
**Typical Net Worth (mil):** \$100

## 35. Marcie Behman

*Merrill PWM, Boston*  
**2018 Rank:** 82  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$1,570  
**Typical Acct Size (mil):** \$30  
**Typical Net Worth (mil):** \$70

## 36. Sharon Oberlander

*Merrill Lynch WM, Chicago*  
**2018 Rank:** 26  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$1,049  
**Typical Acct Size (mil):** \$5.5  
**Typical Net Worth (mil):** \$12

## 37. Emily Rubin

*UBS Financial Services, New York*  
**2018 Rank:** 31  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$1,277  
**Typical Acct Size (mil):** \$10  
**Typical Net Worth (mil):** \$15

## 38. Debra Brede

*D.K. Brede Investment Mgmt., Needham, Mass.*  
**2018 Rank:** 42  
**Client Types:** Retail, HNW, UHNW, Institutional  
**Total Assets (mil):** \$1,018  
**Typical Acct Size (mil):** \$2  
**Typical Net Worth (mil):** \$3.5

## 39. Deb Wetherby

*Wetherby Asset Management, San Francisco*  
**2018 Rank:** 32  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$5,041  
**Typical Acct Size (mil):** \$32.76  
**Typical Net Worth (mil):** \$40

## 40. Jennifer Marcontell

*Edward Jones, Baytown, Texas*  
**2018 Rank:** 55  
**Client Types:** Retail, HNW  
**Total Assets (mil):** \$1,136  
**Typical Acct Size (mil):** \$1.6  
**Typical Net Worth (mil):** \$3.66

## 41. Geri Pell

*Ameriprise Financial Services, Rye Brook, N.Y.*  
**2018 Rank:** 28  
**Client Types:** Retail, HNW, UHNW  
**Total Assets (mil):** \$1,398  
**Typical Acct Size (mil):** \$2.51  
**Typical Net Worth (mil):** \$5.5

## 42. Emily Van Hoorickx

*UBS Financial Services, San Jose, Calif.*  
**2018 Rank:** 41  
**Client Types:** Retail, HNW, UHNW  
**Total Assets (mil):** \$6,465  
**Typical Acct Size (mil):** \$2  
**Typical Net Worth (mil):** \$10

**43. Debbie Jorgensen**  
Merrill Lynch WM,  
San Francisco  
**2018 Rank:** 29  
**Client Types:** HNW, UHNW,  
Foundations, Endowments  
**Total Assets (mil):** \$1,823  
**Typical Acct Size (mil):** \$30  
**Typical Net Worth (mil):** \$65

**44. Lisa Reed**  
Neuberger Berman,  
Los Angeles  
**2018 Rank:** 39  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$891  
**Typical Acct Size (mil):** \$7  
**Typical Net Worth (mil):** \$10

**45. Deborah Howard**  
Merrill Lynch WM, Atlanta  
**2018 Rank:** 36  
**Client Types:** Retail,  
HNW, UHNW, Foundations,  
Endowments, Institutional  
**Total Assets (mil):** \$79,634  
**Typical Acct Size (mil):** \$4210  
**Typical Net Worth (mil):** \$7000

**46. Louise Gunderson**  
UBS Financial Services,  
New York  
**2018 Rank:** 40  
**Client Types:** Retail, HNW,  
UHNW  
**Total Assets (mil):** \$906  
**Typical Acct Size (mil):** \$4.75  
**Typical Net Worth (mil):**  
\$12.75

**47. Elizabeth Weikes**  
J.P. Morgan Securities,  
New York  
**2018 Rank:** 48  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$2,944  
**Typical Acct Size (mil):** \$25  
**Typical Net Worth (mil):** \$25

**48. Christina Boyd**  
Merrill Lynch WM,  
Wayzata, Minn.  
**2018 Rank:** 45  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$995  
**Typical Acct Size (mil):** \$6  
**Typical Net Worth (mil):** \$15

**49. Alyssa Moeder**  
Merrill PWM, New York  
**2018 Rank:** 49  
**Client Types:** HNW, UHNW,  
Endowments  
**Total Assets (mil):** \$5,243  
**Typical Acct Size (mil):** \$25  
**Typical Net Worth (mil):** \$100

**50. Tracey Gluck**  
J.P. Morgan Securities,  
Los Angeles  
**2018 Rank:** 51  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$1,150  
**Typical Acct Size (mil):** \$10  
**Typical Net Worth (mil):** \$15

**51. Sonia Attkiss**  
UBS Financial Services,  
New York  
**2018 Rank:** 11  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$2,360  
**Typical Acct Size (mil):** \$30  
**Typical Net Worth (mil):** \$50

**52. Megan Bailey**  
Merrill Lynch WM,  
Blue Bell, Pa.  
**2018 Rank:** N  
**Client Types:** Retail, HNW,  
UHNW  
**Total Assets (mil):** \$5,089  
**Typical Acct Size (mil):** \$5  
**Typical Net Worth (mil):** \$10

**53. Charla McIntyre**  
Fields  
Ameriprise Financial Services,  
Hurst, Texas  
**2018 Rank:** 53  
**Client Types:** Retail, HNW,  
UHNW  
**Total Assets (mil):** \$1,282  
**Typical Acct Size (mil):** \$1.5  
**Typical Net Worth (mil):** \$5.5

**54. Shari Burns**  
United Capital Seattle, Seattle  
**2018 Rank:** 46  
**Client Types:** HNW, UHNW,  
Foundations  
**Total Assets (mil):** \$1,819  
**Typical Acct Size (mil):** \$5.94  
**Typical Net Worth (mil):** \$7.5

**55. Courtney Moore**  
Merrill PWM, New York  
**2018 Rank:** N  
**Client Types:** HNW, UHNW,  
Foundations, Endowments,  
Institutional  
**Total Assets (mil):** \$8,152  
**Typical Acct Size (mil):** \$10  
**Typical Net Worth (mil):**  
\$75.00

**56. Renee Fourcade**  
UBS Financial Services,  
Los Angeles  
**2018 Rank:** 50  
**Client Types:** HNW, UHNW,  
Institutional  
**Total Assets (mil):** \$4,254  
**Typical Acct Size (mil):** \$10  
**Typical Net Worth (mil):** \$15

**57. Diane Compardo**  
Moneta Group, Clayton, Mo.  
**2018 Rank:** 62  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$1,550  
**Typical Acct Size (mil):** \$15.00  
**Typical Net Worth (mil):**  
\$18.00

**58. Jane Newton**  
RegentAtlantic,  
Morristown, N.J.  
**2018 Rank:** N  
**Client Types:** HNW, UHNW,  
Institutional  
**Total Assets (mil):** \$4,287  
**Typical Acct Size (mil):** \$3.03  
**Typical Net Worth (mil):** \$5

**59. Jacqueline Willens**  
UBS Financial Services,  
New York  
**2018 Rank:** 44  
**Client Types:** Retail, HNW,  
UHNW  
**Total Assets (mil):** \$925  
**Typical Acct Size (mil):** \$5  
**Typical Net Worth (mil):** \$10

**60. Donna Di Ianni**  
Merrill Lynch WM, Aspen, Colo.  
**2018 Rank:** 73  
**Client Types:** HNW, UHNW,  
Foundations  
**Total Assets (mil):** \$1,198  
**Typical Acct Size (mil):** \$8.5  
**Typical Net Worth (mil):** \$20

**61. Susan Kim**  
Ameriprise Financial Services,  
Vienna, Va.  
**2018 Rank:** 66  
**Client Types:** Retail, HNW,  
UHNW  
**Total Assets (mil):** \$1,569  
**Typical Acct Size (mil):** \$1.3  
**Typical Net Worth (mil):** \$2.4

**62. Lisa Detanna**  
Raymond James, Beverly Hills  
**2018 Rank:** 58  
**Client Types:** Retail, HNW,  
UHNW, Foundations, Institu-  
tional  
**Total Assets (mil):** \$3,305  
**Typical Acct Size (mil):** \$5  
**Typical Net Worth (mil):** \$7

**63. Melissa Corrado**  
Harrison  
UBS Financial Services,  
Denver  
**2018 Rank:** 85  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$1,395  
**Typical Acct Size (mil):** \$25  
**Typical Net Worth (mil):** \$100

**64. Kathleen Roeser**  
Morgan Stanley WM, Chicago  
**2018 Rank:** 54  
**Client Types:** HNW, UHNW,  
Institutional  
**Total Assets (mil):** \$1,316  
**Typical Acct Size (mil):** \$8  
**Typical Net Worth (mil):** \$15

**65. Nancy Daoud**  
Ameriprise Financial Services,  
Oxford, Conn.  
**2018 Rank:** N  
**Client Types:** Retail, HNW  
**Total Assets (mil):** \$1,147  
**Typical Acct Size (mil):** \$0.75  
**Typical Net Worth (mil):** \$3.5

**66. Barbara Yee**  
Morgan Stanley WM, New York  
**2018 Rank:** N  
**Client Types:** Retail, HNW,  
UHNW, Foundations  
**Total Assets (mil):** \$1,500  
**Typical Acct Size (mil):** \$6  
**Typical Net Worth (mil):** \$50

**67. Linnell Sullivan**  
Merrill Lynch WM, Cincinnati  
**2018 Rank:** 60  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$1,411  
**Typical Acct Size (mil):** \$5  
**Typical Net Worth (mil):** \$10

**68. Faith Xenos**  
Singer Xenos Schechter Sosler  
WM, Coral Gables, Fla.  
**2018 Rank:** 64  
**Client Types:** Retail, HNW,  
UHNW, Foundations, Endow-  
ments  
**Total Assets (mil):** \$1,531  
**Typical Acct Size (mil):** \$3.2  
**Typical Net Worth (mil):** \$8.80

**69. Margaret Starnier**  
Raymond James,  
Coral Gables, Fla.  
**2018 Rank:** 37  
**Client Types:** Retail, HNW,  
UHNW  
**Total Assets (mil):** \$1,116  
**Typical Acct Size (mil):** \$5  
**Typical Net Worth (mil):** \$7

**70. Robin Reich**  
Merrill Lynch WM, New York  
**2018 Rank:** 65  
**Client Types:** Retail, HNW,  
UHNW  
**Total Assets (mil):** \$1,286  
**Typical Acct Size (mil):** \$2.5  
**Typical Net Worth (mil):** \$10

**71. Trudy Haussmann**  
Haussmann Financial,  
Lake Forest, Calif.  
**2018 Rank:** 56  
**Client Types:** Retail, HNW  
**Total Assets (mil):** \$1,080  
**Typical Acct Size (mil):** \$0.5  
**Typical Net Worth (mil):** \$1.5

**72. Susan Kingsolver**  
Morgan Stanley PWM,  
New York  
**2018 Rank:** 43  
**Client Types:** Retail, HNW,  
UHNW  
**Total Assets (mil):** \$1,129  
**Typical Acct Size (mil):** \$20  
**Typical Net Worth (mil):** \$75

**73. Judith McGee**  
Raymond James,  
Portland, Ore.  
**2018 Rank:** 77  
**Client Types:** Retail, HNW  
**Total Assets (mil):** \$613  
**Typical Acct Size (mil):** \$1  
**Typical Net Worth (mil):** \$3

**74. Anouchka Balog**  
Morgan Stanley WM,  
Laguna Niguel, Calif.  
**2018 Rank:** 75  
**Client Types:** Retail, HNW,  
UHNW  
**Total Assets (mil):** \$637  
**Typical Acct Size (mil):** \$5  
**Typical Net Worth (mil):** \$10

**75. Donna Joyner**  
Merrill Lynch WM,  
Alpharetta, Ga.  
**2018 Rank:** N  
**Client Types:** Retail, HNW,  
UHNW  
**Total Assets (mil):** \$940  
**Typical Acct Size (mil):** \$8  
**Typical Net Worth (mil):** \$10

**76. Marie Vanerian**  
Merrill Lynch WM, Troy, Mich.  
**2018 Rank:** 70  
**Client Types:** HNW, UHNW,  
Endowments, Institutional  
**Total Assets (mil):** \$2,080  
**Typical Acct Size (mil):** \$20  
**Typical Net Worth (mil):** \$20

**77. Teresa Jacobsen**  
UBS Financial Services,  
Stamford, Conn.  
**2018 Rank:** 59  
**Client Types:** HNW, UHNW,  
Foundations, Endowments,  
Institutional  
**Total Assets (mil):** \$883  
**Typical Acct Size (mil):** \$15  
**Typical Net Worth (mil):** \$25

**78. Ann Marie Etergino**  
RBC WM, Chevy Chase, Md.  
**2018 Rank:** 63  
**Client Types:** Retail, HNW,  
UHNW, Foundations, Endow-  
ments, Institutional  
**Total Assets (mil):** \$1,210  
**Typical Acct Size (mil):** \$7.5  
**Typical Net Worth (mil):** \$15

**79. Melissa Spickler**  
Merrill Lynch WM,  
Bloomfield Hills, Mich.  
**2018 Rank:** 87  
**Client Types:** Retail, HNW,  
UHNW, Institutional  
**Total Assets (mil):** \$1,185  
**Typical Acct Size (mil):** \$2  
**Typical Net Worth (mil):** \$5

**80. Jean Gannon**  
UBS Financial Services,  
Palo Alto  
**2018 Rank:** 74  
**Client Types:** UHNW  
**Total Assets (mil):** \$2,336  
**Typical Acct Size (mil):** \$75  
**Typical Net Worth (mil):** \$154

**81. Judy Fredrickson**  
UBS Financial Services,  
Minneapolis  
**2018 Rank:** 72  
**Client Types:** HNW, UHNW  
**Total Assets (mil):** \$1,657  
**Typical Acct Size (mil):** \$18  
**Typical Net Worth (mil):** \$32

**82. Alma Guimarin**  
Morgan Stanley WM,  
San Jose, Calif.  
**2018 Rank:** 83  
**Client Types:** Retail, HNW,  
UHNW  
**Total Assets (mil):** \$883  
**Typical Acct Size (mil):** \$3  
**Typical Net Worth (mil):** \$7

**83. Sharon Sager**  
UBS Financial Services,  
New York  
**2018 Rank:** 71  
**Client Types:** HNW, UHNW,  
Foundations, Endowments,  
Institutional  
**Total Assets (mil):** \$1,125  
**Typical Acct Size (mil):** \$50  
**Typical Net Worth (mil):** \$50

**84. Vanessa Anderson**  
UBS Financial Services,  
Palo Alto  
**2018 Rank:** 76  
**Client Types:** UHNW  
**Total Assets (mil):** \$2,336  
**Typical Acct Size (mil):** \$75  
**Typical Net Worth (mil):** \$154

**85. Elizabeth Armitage**  
Merrill Lynch WM,  
Cincinnati  
**2018 Rank:** 68  
**Client Types:** Retail, HNW,  
UHNW, Institutional  
**Total Assets (mil):** \$2,402  
**Typical Acct Size (mil):** \$1.5  
**Typical Net Worth (mil):** \$5.5

**86. Nicole Christians**  
Merrill Lynch WM,  
Farmington Hills, Mich.  
**2018 Rank:** N  
**Client Types:** Retail, HNW,  
UHNW, Institutional  
**Total Assets (mil):** \$2,078  
**Typical Acct Size (mil):** \$1  
**Typical Net Worth (mil):** \$5



**87. Kim Ciccarelli Kantor***Ciccarelli Advisory Services,  
Naples, Fla.***2018 Rank:** 79**Client Types:** Retail, HNW,  
UHNW**Total Assets (mil):** \$1,877**Typical Acct Size (mil):** \$4**Typical Net Worth (mil):** \$7**88. Marie A. Moore***Morgan Stanley WM,  
Dallas***2018 Rank:** 89**Client Types:** Retail, HNW,  
UHNW**Total Assets (mil):** \$489**Typical Acct Size (mil):** \$2**Typical Net Worth (mil):** \$5**89. Cheryl Holland***Abacus Planning Group,  
Columbia, S.C.***2018 Rank:** 57**Client Types:** HNW, UHNW**Total Assets (mil):** \$1,128**Typical Acct Size (mil):** \$4.71**Typical Net Worth (mil):** \$11.6**90. Kimberly Dwyer***CIBC PWM,  
Boston***2018 Rank:** 52**Client Types:** HNW, UHNW,  
Institutional**Total Assets (mil):** \$7,595**Typical Acct Size (mil):** \$16.92**Typical Net Worth (mil):** \$15**91. Jana Shoulders***Mariner Wealth Advisors,  
Tulsa, Okla.***2018 Rank:** 78**Client Types:** Retail, HNW,  
UHNW**Total Assets (mil):** \$1,142**Typical Acct Size (mil):** \$6.2**Typical Net Worth (mil):** \$9**92. Kathleen Malone***Wells Fargo Advisors,  
Charlotte, N.C.***2018 Rank:** 69**Client Types:** HNW, UHNW**Total Assets (mil):** \$3,491**Typical Acct Size (mil):** \$7**Typical Net Worth (mil):** \$12**93. Leslie Lauer***UBS Financial Services,  
Atlanta***2018 Rank:** 61**Client Types:** HNW, UHNW,  
Institutional**Total Assets (mil):** \$3,455**Typical Acct Size (mil):** \$22**Typical Net Worth (mil):** \$40**94. Audree Begay***Ameriprise Financial Services,  
Houston***2018 Rank:** 84**Client Types:** Retail, HNW,  
UHNW**Total Assets (mil):** \$996**Typical Acct Size (mil):** \$1.5**Typical Net Worth (mil):** \$3**95. Lee DeLorenzo***United Asset Strategies,  
Garden City, N.Y.***2018 Rank:** 88**Client Types:** Retail, HNW,  
UHNW, Institutional**Total Assets (mil):** \$962**Typical Acct Size (mil):** \$1**Typical Net Worth (mil):** \$5**96. Janet Franco Gordon***Morgan Stanley WM,  
Coral Gables, Fla.***2018 Rank:** N**Client Types:** Retail, HNW,  
UHNW**Total Assets (mil):** \$890**Typical Acct Size (mil):** \$6**Typical Net Worth (mil):** \$15**97. Emily Bach***Morgan Stanley WM,  
Orinda, Calif.***2018 Rank:** 80**Client Types:** Retail, HNW,  
UHNW**Total Assets (mil):** \$1,084**Typical Acct Size (mil):** \$4**Typical Net Worth (mil):** \$6**98. Christina Collins***Northwestern Mutual,  
Chicago***2018 Rank:** 86**Client Types:** Retail, HNW,  
UHNW**Total Assets (mil):** \$849**Typical Acct Size (mil):** \$2.8**Typical Net Worth (mil):** \$3.5**99. Thais Piotrowski***Ameriprise Financial Services,  
Boca Raton, Fla.***2018 Rank:** 96**Client Types:** Retail, HNW,  
UHNW**Total Assets (mil):** \$872**Typical Acct Size (mil):** \$0.81**Typical Net Worth (mil):** \$2**100. Dee Ann Schedler***CIBC PWM,  
Washington, D.C.***2018 Rank:** 47**Client Types:** HNW, UHNW,  
Institutional**Total Assets (mil):** \$2,122**Typical Acct Size (mil):** \$10.61**Typical Net Worth (mil):** \$12

N=Not Ranked Note: For more information on Barron's Top Advisors, contact Matt Barthel at [matthew.barthel@barrons.com](mailto: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](mailto:Jennifer.Pedone@barrons.com).

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