

THE BARRON'S

Advisor Directory

For more information on these and other Barron's ranked advisors, please visit [barrons.com/directory](https://www.barrons.com/directory).

Every year, readers ask us how to get in touch with advisors who are ranked in Barron's. The Advisor Directory is a special section — published four times a year in *Barron's* and twice a year in *The Wall Street Journal*, and also available online — is an effort to make that easier.

What is the directory? The Directory is a reprint made up of all current advisor rankings. It allows Barron's-ranked advisors (and only Barron's-ranked advisors) to publish their contact information. Advisors pay a fee to be listed in this section, but their participation has no bearing on their place in our rankings, nor does it guarantee that they will be ranked in future years.

How do advisors become ranked?

Advisors who wish to be listed on one of our editorial rankings fill out a 102-question survey about their practice. We verify that data with the advisors' firms and with regulatory databases and then we apply our rankings formula to the data to generate a ranking. The formula features three major categories of calculations: assets, revenue and quality of practice. In each of those categories we do multiple subcalculations.

Do you only measure assets under management? Assets under management (AUM) is an objective and transparent way

to measure a practice. However, we put AUM into context by considering not just the amount of assets, but also the type of assets. We measure growth of an advisor's practice and their client retention. We also consider a wide range of qualitative factors, including the advisors' experience, their advanced degrees and industry designations, the size and shape of their teams, their charitable and philanthropic work and, their compliance records.

We have spent more than 15 years perfecting the balance of these factors to create a consistent and clear benchmark that accounts for the wide range of practice models in the wealth management industry and minimizes any bias or human error.

How does the directory help me find an advisor? The directory and rankings are meant as a starting point for clients looking for an advisor—a first-pass vetting that can help investors narrow a search. Every advisor will have his or her own approach to investing, financial planning and other services. Clients are encouraged to approach the search for an advisor the way they would a search for a doctor—interviewing multiple professionals and getting opinions from multiple third parties. ■

SPECIAL ADVERTISING SECTION

ALABAMA

Mark Mantooth

Merrill
Huntsville
fa.ml.com/mantooth_pols
(256) 650-2441
mark_mantooth@ml.com
\$911m Team Assets
\$3.0m Typical Account Size

Robert Runkle

Merrill
Montgomery
fa.ml.com/Robert_Runkle
(334) 409-5810
robert_runkle@ml.com
\$1,592m Team Assets
\$1.5m Typical Account Size

ARIZONA

Robert Bancroft

Financial Advisor
Morgan Stanley PWM
Scottsdale
advisor.morganstanley.com/bbsg
(480) 624-5714
robert.bancroft@morganstanleypwm.com
\$1,137m Team Assets
\$20.0m Typical Account Size

Joe Di Vito

RBC Wealth Management
Phoenix
us.rbcwealthmanagement.com/
thedivitoconsultinggroup
(602) 381-5340
joe.divito@rbc.com
\$400m Team Assets
\$2.0m Typical Account Size

Allan Flader

RBC Wealth Management
Phoenix
fladergroup.com
(602) 381-5388
allan.flader@rbc.com
\$725m Team Assets
\$2.5m Typical Account Size

Kent Hughes

Merrill
Phoenix
fa.ml.com/kent-hughes
(602) 954-5918
kent_hughes@ml.com
\$422m Team Assets
\$1.7m Typical Account Size

James Marten

Merrill
Phoenix
fa.ml.com/martengroup
(602) 954-5016
james_marten@ml.com
\$2,379m Team Assets
\$3.5m Typical Account Size

David Stahle

Merrill
Gilbert
fa.ml.com/sbgroupaz
(480) 752-6435
david_stahle@ml.com
\$2,509m Team Assets
\$3.0m Typical Account Size

Mark Stein

Galvin, Gaustad and Stein, LLC
Scottsdale
ggsadvisors.com
(480) 776-1440
Mark@ggsadvisors.com
\$802m Team Assets
\$1.8m Typical Account Size

Ruth Transue

Wells Fargo Advisors
Tucson
fa.wellsfargoadvisors.com/ruth-transue
(520) 529-5932
transuer@wellsfargo.com
\$700m Team Assets
\$2.0m Typical Account Size

Trevor Wilde

Wilde Wealth Management Group
Scottsdale
wildewealth.com
(480) 361-6203
trevor@wildewealth.com
\$801m Team Assets
\$0.5m Typical Account Size

CALIFORNIA

Emily Bach

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The Bach Group at Morgan Stanley
Orinda
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(925) 253-5322
emily.bach@morganstanley.com
\$1,084m Team Assets
\$4.0m Typical Account Size

Anouchka Balog

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Morgan Stanley
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\$637m Team Assets
\$5.0m Typical Account Size

Jim Berliner

Westmount Asset Mgmt, LLC
Los Angeles
westmount.com
(310) 556-2502
jberliner@westmount.com
\$3,235m Team Assets
\$3.0m Typical Account Size

Kerrick Bubb

KWB Wealth Managers
Redlands
kwbwealth.com
(909) 307-8220
invest@kwbwealthmanagers.com
\$709m Team Assets
\$0.7m Typical Account Size

Steven Check

Check Capital Management Inc.
Costa Mesa
checkcapital.com
(714) 641-3579
scheck@checkcapital.com
\$1,463m Team Assets
\$1.0m Typical Account Size

Randy Connor

Churchill Management Group
Los Angeles
churchillmanagement.com
(877) 937-7110
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\$5,545m Team Assets
\$0.75m Typical Account

Fred Fern

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(877) 937-7110
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\$5,545m Team Assets
\$0.8m Typical Account Size

Gary Fournier

J.P. Morgan Securities
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jpmorgansecurities.com/
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(866) 720-4309
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\$1,313m Team Assets
\$10.0m Typical Account Size

Tracey Gluck

J.P. Morgan Securities
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jpmorgansecurities.com/gluckgroup
(310) 201-2610
tracey.gluck@jpmorgan.com
\$1,150m Team Assets
\$10.0m Typical Account Size

Adam S. Goldstein

Goldstein & Associates, Ameriprise
Calabasas
ameripriseadvisors.com/
adam.s.goldstein
(818) 704-6675
adam.s.goldstein@ampf.com
\$1,585m Team Assets
\$1.0m Typical Account Size

Philippe Hartl

Merrill Wealth Management
Century City
pwa.ml.com/hartl_team
(310) 407-3984
philippe_hartl@ml.com
\$5,833m Team Assets
\$45.0m Typical Account Size

Brian Holmes

Signature Estate and Investment
Advisors, LLC
Los Angeles
seia.com
(310) 712-2324
bholmes@seia.com
\$9,048m Team Assets
\$8.0m Typical Account Size

Richard Jones

Merrill PWM
Los Angeles
pwa.ml.com/joneszafarigroup
(310) 407-4925
Richardb_jones@ml.com
\$13,525m Team Assets
\$50.0m Typical Account Size

John McNamee

Merrill PBIG
Los Angeles
pwa.ml.com/mcnameewhite
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john_mcnamee@ml.com
\$4,505m Team Assets
\$50.0m Typical Account Size

Elaine Meyers

J.P. Morgan Securities
San Francisco
jpmorgansecurities.com/elainemeyers
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elaine.meyers@jpmorgan.com
\$3,200m Team Assets
\$50.0m Typical Account Size

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San Francisco
jpmorgansecurities.com/os-group
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\$3,550m Team Assets
\$15.0m Typical Account Size

George Papadoyannis

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San Mateo
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george.x.papadoyannis
(650) 303-9553
george.x.papadoyannis@ampf.com
\$6,500m Team Assets
\$2.5m Typical Account Size

Participation in this section is only open to Barron's ranked advisors. Ranked advisors pay a fee to be listed in this reprint. Participation in this section has no bearing on the outcome of our rankings. Assets are tied to the most recent ranking. For more information, visit barrons.com/directory.

SPECIAL ADVERTISING SECTION

CALIFORNIA CONT'D

Laila Pence

Pence Wealth Management
Newport Beach

PenceWealthManagement.com
(949) 660-8777
laila.pence@lpl.com

\$1,894m Team Assets
\$2.0m Typical Account Size

Darren Pfefferman

Financial Advisor
Morgan Stanley PWM
San Diego

advisor.morganstanley.com/the-
pfefferman-daluiso-group
(858) 597-7754
darren.a.pfefferman@
morganstanleypwm.com

\$1,561m Team Assets
\$10.0m Typical Account Size

Spuds Powell

Kayne Anderson Rudnick
Investment Management
Los Angeles

kayne.com
(310) 282-7945
spowell@kayne.com

\$26,830m Team Assets
\$8.5m Typical Account Size

Alan Whitman

Financial Advisor
Morgan Stanley Wealth Mgmt
Pasadena

fa.morganstanley.com/wz
(626) 405-9313
alan.whitman@morganstanley.com

\$2,845m Team Assets
\$5.0m Typical Account Size

Dale Yahnke

Dowling & Yahnke, LLC
San Diego

dywealth.com
(858) 509-9500
dale.yahnke@dywealth.com

\$4,106m Team Assets
\$4.3m Typical Account Size

Cheryl L. Young

Financial Advisor
Morgan Stanley
Los Gatos

fa.morganstanley.com/
youngandassociates
(408) 358-0976
cheryl.young@morganstanley.com

\$1,628m Team Assets
\$5.0m Typical Account Size

COLORADO

Mark R. Brown

Brown and Company, Inc.
Denver

brownandco.com
(303) 863-7112
mbrown@brownandco.com

\$495m Team Assets
\$7.0m Typical Account Size

Max Bull

Financial Advisor
Financial Advisor
Morgan Stanley PWM
Denver

advisor.morganstanley.com/the-fowler-
bull-group
(303) 595-2105
maxwell.bull@morganstanleypwm.com

\$2,565m Team Assets
\$35.0m Typical Account Size

Melissa Corrado Harrison

UBS Financial Services
Denver

financialservicesinc.ubs.com/team/
corrado-harrison
(303) 820-5770
melissa.harrison@ubs.com

\$1,395m Team Assets
\$25.0m Typical Account Size

Shawn Fowler

Financial Advisor
Morgan Stanley PWM
Denver

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shawn.fowler@morganstanley.com

\$3,212m Team Assets
\$35.0m Typical Account Size

Carl Hoover

Merrill PBIG
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Carl_Hoover@ml.com

\$2,397m Team Assets
\$15.0m Typical Account Size

Joseph Janiczek

Janiczek Wealth Management
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(303) 721-7000
cwegner@janiczek.com

\$513m Team Assets
\$2.5m Typical Account Size

Wally Obermeyer

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\$1,635m Team Assets
\$3.0m Typical Account Size

Scott Thisted

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\$2,397m Team Assets
\$15.0m Typical Account Size

CONNECTICUT

Peter Chieco

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Greenwich

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\$1,886m Team Assets
\$5.0m Typical Account Size

Jeff Erdmann

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Greenwich

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\$7,564m Team Assets
\$40.0m Typical Account Size

David Goodwin

Merrill
Hartford

FA.ML.COM/GOODWIN_GROUP
(800) 998-9837
David_Goodwin@ML.com

\$690m Team Assets
\$6.0m Typical Account Size

William Greco

UBS Financial Services
Hartford

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grecogroup
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william.greco@ubs.com

\$3,569m Team Assets
\$10.0m Typical Account Size

Thomas Markey

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Morgan Stanley
Stamford

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thomas.markey@morganstanley.com

\$1,039m Team Assets
\$5.0m Typical Account Size

Charles J. Noble, III

Janney Montgomery Scott LLC
New Haven

advisor.janney.com/
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(203) 784-7401
noblegroup@janney.com

\$993m Team Assets
\$6.0m Typical Account Size

Harold Trischman

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Greenwich

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\$2,150m Team Assets
\$5.0m Typical Account Size

WASHINGTON, D.C.

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\$1,549m Team Assets
\$1.3m Typical Account Size

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Washington

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wealth-management-group
(202) 778-1381
Marvin.mcintyre@morganstanleypwm.
com

\$3,293m Team Assets
\$7.5m Typical Account Size

John McKnight

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Washington

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\$1,321m Team Assets
\$1.0m Typical Account Size

DELEWARE

Donald DeWees, Sr

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Greenville

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\$995m Team Assets
\$2.0m Typical Account Size

Michael Koppenhaver

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\$704m Team Assets
\$1.9m Typical Account Size

SPECIAL ADVERTISING SECTION

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\$633m Team Assets
\$1.5m Typical Account Size

FLORIDA

Richard Altieri

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Morgan Stanley
Boca Raton
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richard.altieri@morganstanley.com
\$876m Team Assets
\$5.0m Typical Account Size

Louise Armour

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Palm Beach Gardens
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louise.armour@jpmorgan.com
\$3,327m Team Assets
\$12.0m Typical Account Size

Peter Bermont

Raymond James
Coral Gables
Bermontadvisorygroup.com
(305) 446-6600
peter.bermont@raymondjames.com
\$1,772m Team Assets
\$12.5m Typical Account Size

Adam Carlin

Financial Advisor
Morgan Stanley PWM
Coral Gables
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(305) 476-3302
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\$2,500m Team Assets
\$17.5m Typical Account Size

Aimee Cogan

Financial Advisor
Morgan Stanley
Sarasota
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(941) 363-8513
Aimee.Cogan@Morganstanley.com
\$865m Team Assets
\$10.0m Typical Account Size

Don d'Adesky

Raymond James
Boca Raton
raymondjames.com/theamericasgroup
(561) 981-3690
don.dadesky@raymondjames.com
\$3,725m Team Assets
\$5.0m Typical Account Size

Robert Edwards

Edwards Asset Management
Naples
edwardsnaples.com
(239) 264-1000
bob.edwards@edwardsnaples.com
\$4,227m Team Assets
\$5.0m Typical Account Size

Janet Franco Gordon

Financial Advisor
Morgan Stanley
Coral Gables
fa.morganstanley.com/thegordongroup
(305) 476-3304
janet.franco.gordon@morganstanley.com
\$890m Team Assets
\$6.0m Typical Account Size

Eric Glasband

Merrill
Boca Raton
fa.ml.com/gs
(561) 361-3437
eric.glasband@ml.com
\$962m Team Assets
\$4.2m Typical Account Size

William King

Merrill Wealth Management
Vero Beach
fa.ml.com/new-york/new-york/the-king-group
(772) 231-9037
william_w_king@ml.com
\$1,174m Team Assets
\$8.0m Typical Account Size

Clarke Lemons

WaterOak Advisors, LLC
Winter Park
wateroak.com
(407) 567-2956
barrons@wateroak.com
\$2,052m Team Assets
\$3.0m Typical Account Size

William Merriam

Merrill
Jacksonville
fa.ml.com/bill_merriam
(904) 218-5931
william_h_merriam@ml.com
\$987m Team Assets
\$2.0m Typical Account Size

Mark Miller

Merrill
Boca Raton
fa.ml.com/mark-miller-and-associates
(561) 416-4629
mark_m_miller@ml.com
\$801m Team Assets
\$2.0m Typical Account Size

Thomas Moran

Moran Wealth Management
Naples
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(239) 920-4440
Thomas.Moran@MoranWM.com
\$3,049m Team Assets
\$5.0m Typical Account Size

Scott Pinkerton

Pinkerton Private Wealth
Sarasota
pinkertonpw.com
(866) 209-8557
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\$1,078m Team Assets
\$5.4m Typical Account Size

Andrew Schultz

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Morgan Stanley
Miami Beach
fa.morganstanley.com/theschultzgroup
(305) 695-6116
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\$703m Team Assets
\$10.0m Typical Account Size

Michael Silver

Baron Silver Stevens Financial
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bssfafa.com
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msilver@bssfafa.com
\$603m Team Assets
\$1.0m Typical Account Size

Marc Singer

Mariner Wealth Advisors
Coral Gables
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(305) 443-0060
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\$1,597m Team Assets
\$2.8m Typical Account Size

Sal Tiano

J.P. Morgan Securities
Palm Beach Gardens
jpmorgansecurities.com/tas
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\$3,355m Team Assets
\$20.0m Typical Account Size

Faith Xenos

Mariner Wealth Advisors
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marinerwealthadvisors.com
(305) 443-0060
faith.xenos@marinerwealthadvisors.com
\$1,531m Team Assets
\$3.2m Typical Account Size

GEORGIA

Robert Balentine

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rbalentine@balentine.com
\$3,078m Team Assets
\$18.4m Typical Account Size

Andy Berg

Homrich Berg
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Info@HomrichBerg.com
\$5,760m Team Assets
\$3.5m Typical Account Size

Roger Green

Green Financial Resources, LLC
Duluth
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(770) 931-1414
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\$501m Team Assets
\$0.2m Typical Account Size

James Hansberger

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\$2,575m Team Assets
\$35.0m Typical Account Size

Michael Hines

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\$734m Team Assets
\$2.5m Typical Account Size

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SPECIAL ADVERTISING SECTION

GEORGIA, CONT'D

Wes Moss

Capital Investment Advisors
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\$2,309m Team Assets
\$1.5m Typical Account Size

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\$4,735m Team Assets
\$40.0m Typical Account Size

ILLINOIS

Kyle Chudom

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\$862m Team Assets
\$1.0m Typical Account Size

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\$2,200m Team Assets
\$40.0m Typical Account Size

Daniel Fries

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\$912m Team Assets
\$3.0m Typical Account Size

James Moriarity

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Morgan Stanley PWM
Chicago

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dehond-mulka
(312) 453-9110
james.moriarity@morganstanley.com

\$2,200m Team Assets
\$40.0m Typical Account Size

Maureen Raihle

Merrill PWM
Chicago

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(312) 325-2635
maureen_raihle@ml.com

\$5,130m Team Assets
\$20.0m Typical Account Size

David Sheppard

Merrill
Deer Park

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david_n_sheppard@ml.com

\$991m Team Assets
\$6.0m Typical Account Size

Joseph Silich

Financial Advisor
Morgan Stanley
Chicago

fa.morganstanley.com/thesilichgroup
(312) 443-6200
joseph.silich@morganstanley.com

\$1,090m Team Assets
\$7.0m Typical Account Size

Mark Thorndyke

Merrill Wealth Management
Chicago

fa.ml.com/illinois/deer-park/
thorndykesheppardgroup
(312) 696-7645
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\$1,324m Team Assets
\$6.0m Typical Account Size

John Ver Bockel

Merrill PWM
Chicago

pwa.ml.com/vrgroup
(312) 325-2634
john_verbockel@ml.com

\$4,465m Team Assets
\$20.0m Typical Account Size

David Wright

Merrill PBIG
Chicago

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dave_wright@ml.com

\$2,382m Team Assets
\$25.0m Typical Account Size

IOWA

Timothy Finucan

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Webster City

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timothy.finucan@edwardjones.com

\$587m Team Assets
\$0.8m Typical Account Size

Matt Fryar

Wells Fargo Advisors
Des Moines

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\$750m Team Assets
\$5.0m Typical Account Size

KANSAS

Marty Bicknell

Mariner Wealth Advisors
Overland Park

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startyourjourney@
marinerwealthadvisors.com

\$18,678m Team Assets
\$1.5m Typical Account Size

Scott Ferguson

Financial Advisor
Morgan Stanley
Leawood

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(913) 402-5290
scott.ferguson@ms.com

\$803m Team Assets
\$5.0m Typical Account Size

KENTUCKY

Barry Barlow

Merrill
Louisville

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\$824m Team Assets
\$4.0m Typical Account Size

LOUISIANA

Charles Simmons

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Metairie

ameripriseadvisors.com/
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\$2,223m Team Assets
\$0.8m Typical Account Size

MASSACHUSETTS

Charles S. Bean III

Heritage Financial Services, LLC
Westwood

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\$1,520m Team Assets
\$3.0m Typical Account Size

Debra Brede

D.K. Brede Investment
Management Co.Inc.
Needham

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(781) 444-9367
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\$1,018m Team Assets
\$2.0m Typical Account Size

Kevin Grimes

Grimes & Company, Inc.
Westborough

grimesco.com
(508) 366-3883
advisors@grimesco.com

\$2,376m Team Assets
\$3.0m Typical Account Size

Susan Kaplan

Kaplan Financial Services, Inc.
Newton

kaplan-financial.com/splash.cfm
(617) 527-1557
susan.kaplan@lpl.com

\$2,030m Team Assets
\$3.5m Typical Account Size

Stephen Kelliher

Financial Advisor
Morgan Stanley Wealth Mgmt
Norwell

fa.morganstanley.com/
thekellihercorbettgroup
(781) 681-4933
stephen.kelliher@ms.com

\$3,475m Team Assets
\$10.0m Typical Account Size

Greg Miller

Wellesley Asset Management, Inc.
Wellesley

wellesleyassetmanagement.com
(781) 416-4000
barrons@wam.com

\$2,839m Team Assets
\$2.0m Typical Account Size

Mary Mullin

Merrill
Boston

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mary_mullin@ml.com

\$2,306m Team Assets
\$5.0m Typical Account Size

Peter Noonan

J.P. Morgan Securities
Boston

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(617) 654-2318
peter.noonan@jpmorgan.com

\$2,301m Team Assets
\$15.0m Typical Account Size

Raju Pathak

Financial Advisor
Morgan Stanley
Boston

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raju.pathak@ms.com

\$1,329m Team Assets
\$8.0m Typical Account Size

SPECIAL ADVERTISING SECTION

Peter Princi

Graystone Consulting
Boston

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(617) 589-3229
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\$6,500m Team Assets
\$10.0m Typical Account Size

Ira Rapaport

New England Private Wealth
Advisors, LLC
Wellesley

nepwealth.com
(781) 416-1700
ira.rapaport@nepwealth.com

\$1,869m Team Assets
\$6.8m Typical Account Size

Raj Sharma

Merrill PWM
Boston

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sharma_group@ml.com

\$6,811m Team Assets
\$10.0m Typical Account Size

Brian Strachan

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Morgan Stanley PWM
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brian.s.strachan@morganstanleypwm.com

\$2,975m Team Assets
\$10.0m Typical Account Size

MARYLAND

Patricia Baum

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Annapolis

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\$1,576m Team Assets
\$3.0m Typical Account Size

Frank Dingle

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Baltimore

brintondinglegroup.com
(410) 659-4681
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\$824m Team Assets
\$1.6m Typical Account Size

Barry Garber

Alex. Brown, Raymond James
Baltimore

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garberwealthmanagementteam
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Barry.Garber@alexbrown.com

\$3,221m Team Assets
\$15.0m Typical Account Size

Brian Kroneberger

RBC Wealth Management
Hunt Valley

dkgroup@rbc.com
(410) 316-5454
brian.kroneberger@rbc.com

\$1,075m Team Assets
\$3.0m Typical Account Size

John Lynch

Lynch Retirement Investment Group
Fulton

lynchretirementgroup.com
(888) 465-8424
john.lynch@lynchretirementgroup.com

\$581m Team Assets
\$1.5m Typical Account Size

Kent Pearce

Merrill
Towson

fa.ml.com/pearce_group
(410) 321-4340
kent_pearce@ml.com

\$1,811m Team Assets
\$7.0m Typical Account Size

Robert Scherer

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Potomac

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graystone-consulting-metropolitan-
washington-d-c
(301) 279-6403
robert.s.scherer@msgraystone.com

\$8,994m Team Assets
\$25.0m Typical Account Size

E. Geoffrey Sella

SPC Financial, Inc.
Rockville

spcfinancial.com
(301) 770-6800
jsella@spcfinancial.com

\$818m Team Assets
\$0.9m Typical Account Size

MAINE

Jeremiah Burns

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Portland

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burns
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jeremiah.burns@morganstanleypwm.com

\$494m Team Assets
\$5.0m Typical Account Size

Todd Doolan

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Portland

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doolan-eldredge-group
(207) 771-0812
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\$348m Team Assets
\$2.1m Typical Account Size

MICHIGAN

Jeffrey Fratarcangeli

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Birmingham

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\$1,250m Team Assets
\$5.0m Typical Account Size

James Kruzan

Kaydan Wealth Management, Inc.
Fenton

KaydanWealthManagement.com
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Jim.Kruzan@KaydanWealth.com

\$476m Team Assets
\$1.5m Typical Account Size

David Kudla

Mainstay Capital Management, LLC
Grand Blanc

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mainstay@mainstaycapital.com

\$2,475m Team Assets
\$0.7m Typical Account Size

Leo Stevenson

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Wyandotte

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leo_stevenson@ml.com

\$667m Team Assets
\$1.5m Typical Account Size

Charles C. Zhang

Zhang Financial
Portage

zhangfinancial.com
(269) 385-5888
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\$3,325m Team Assets
\$2.0m Typical Account Size

MINNESOTA

Ben Marks

Marks Group Wealth Management
Minnetonka

marksgroup.com
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ben.marks@marksgroup.com

\$1,143m Team Assets
\$2.0m Typical Account Size

David A. Olson

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Morgan Stanley
Rochester

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\$868m Team Assets
\$3.5m Typical Account Size

MISSOURI

Michael Moeller

Wells Fargo Advisors
Chesterfield

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mike.moeller@wfadvisors.com

\$1,730m Team Assets
\$3.0m Typical Account Size

Dennis Williams

Financial Advisor
Morgan Stanley PWM
Kansas City

fa.morganstanley.com/
theclevengergroup
(816) 932-7857
Dennis.Williams@morganstanleypwm.com

\$1,078m Team Assets
\$7.0m Typical Account Size

Kathleen Youngerman

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Morgan Stanley PWM
Chesterfield

pwm.morganstanley.com/
harmonyfamilyoffice
(314) 889-4862
Kathleen.L.Youngerman@
morganstanleypwm.com

\$288m Team Assets
\$15.0m Typical Account Size

NORTH CAROLINA

Mike Absher

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Chapel Hill

absherwealth.com
(919) 969-4840
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\$422m Team Assets
\$1.5m Typical Account Size

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NEBRASKA**Ron Carson**

Carson Wealth
Omaha
carsonwealth.com
(888) 321-0808
rcarson@carsongroup.com

\$4,329m Team Assets
\$5.0m Typical Account Size

Jason Dworak

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jason.dworak@ubs.com

\$740m Team Assets
\$7.5m Typical Account Size

Paul West

Carson Wealth
Omaha
carsonwealth.com
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pwest@carsonwealth.com

\$7,500m Team Assets
\$5.0m Typical Account Size

NEVADA**Deborah Danielson**

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danielsonfinancialgroup.com
(702) 734-7000
Deborah@DanielsonFinancialGroup.com

\$686m Team Assets
\$2.0m Typical Account Size

Randy Garcia

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Las Vegas
iccnv.com
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randy@iccnv.com

\$1,088m Team Assets
\$4.5m Typical Account Size

NEW HAMPSHIRE**John Habig**

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Portsmouth
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(603) 422-8901
john.f.habig@morganstanley.com

\$359m Team Assets
\$1.5m Typical Account Size

NEW JERSEY**Bruce Barth**

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bruce_g_barth@ml.com

\$1,211m Team Assets
\$2.0m Typical Account Size

Francis Bitterly

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Red Bank
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\$590m Team Assets
\$2.7m Typical Account Size

David Briegs

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Elliott_M_Kugel@ML.com

\$1,554m Team Assets
\$2.5m Typical Account Size

Jack Burke

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\$4,292m Team Assets
\$6.5m Typical Account Size

Christopher Cook

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\$2,002m Team Assets
\$5.0m Typical Account Size

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mary.m.deatherage@
morganstanleypwm.com

\$2,735m Team Assets
\$10.0m Typical Account Size

John Hudspeth

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\$888m Team Assets
\$3.0m Typical Account Size

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\$1,554m Team Assets
\$2.5m Typical Account Size

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\$1,639m Team Assets
\$5.0m Typical Account Size

Neil McPeak

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\$1,249m Team Assets
\$1.0m Typical Account Size

Thomas Meyer

Meyer Capital Group
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meyercg.com
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feonly@meyercg.com
\$1,131m Team Assets
\$1.5m Typical Account Size

Michael Ricca

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\$4,373m Team Assets
\$8.0m Typical Account Size

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\$689m Team Assets
\$1.0m Typical Account Size

Ken Schapiro

Condor Capital Management
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condorcapital.com
(732) 356-7323
info@condorcapital.com

\$1,062m Team Assets
\$1.9m Typical Account Size

Andy Schwartz

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(973) 244-4202
andy.schwartz@bleakley.com

\$1,445m Team Assets
\$2.5m Typical Account Size

Daniel Schwartz

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Paramus
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(201) 441-4963
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\$1,930m Team Assets
\$10.0m Typical Account Size

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(973) 236-3634
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\$1,462m Team Assets
\$10.0m Typical Account Size

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\$4,382m Team Assets
\$8.0m Typical Account Size

NEW YORK**Lewis Altfest**

Altfest Personal Wealth
Management
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altfest.com
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inquiry@altfest.com

\$1,347m Team Assets
\$2.0m Typical Account Size

Lee DeLorenzo

United Asset Strategies, Inc.
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unitedasset.com
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info@unitedasset.com

\$962m Team Assets
\$1.0m Typical Account Size

Marc Fischer

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Rochester
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\$2,730m Team Assets
\$40.0m Typical Account Size

SPECIAL ADVERTISING SECTION

Gregg Fisher

Gerstein Fisher
New York

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info@gersteinfisher.com

\$2,546m Team Assets
\$1.8m Typical Account Size

Jonathan Kass

Merrill Wealth Management
New York

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(212) 338-6062
jonathan_e_kass@ml.com

\$5,406m Team Assets
\$10.0m Typical Account Size

Jason Katz

UBS Financial Services
New York City

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\$2,637m Team Assets
\$10.0m Typical Account Size

Gerard Klingman

Klingman & Associates, LLC
New York

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(212) 867-7647
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\$2,201m Team Assets
\$10.0m Typical Account Size

Joshua Malkin

Financial Advisor
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New York

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themalkingroup
(212) 893-6530
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\$1,800m Team Assets
\$10.0m Typical Account Size

Ira Mark

RBC Wealth Management
New York

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(212) 703-6033
ira.mark@rbc.com

\$3,300m Team Assets
\$10.0m Typical Account Size

Leo Marzen

Bridgewater Advisors Inc
New York

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lmarzen@bridgewateradv.com

\$1,485m Team Assets
\$5.0m Typical Account Size

Ed Moldaver

Stifel Financial
New York

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(212) 328-1677
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\$6,500m Team Assets
\$10.0m Typical Account Size

Deborah Montaperto

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Morgan Stanley PWM
New York

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polkwealthmanagementgroup
(212) 761-8934
deborah.d.montaperto@
morganstanleypwm.com

\$16,445m Team Assets
\$50.0m Typical Account Size

Daniel O'Connell

Merrill
Garden City

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(516) 877-8316
daniel_oconnell@ml.com

\$2,372m Team Assets
\$15.0m Typical Account Size

John Olson

Merrill Wealth Management
New York

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(212) 303-4010
john_olson@ml.com

\$1,985m Team Assets
\$8.0m Typical Account Size

Lyon Polk

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Morgan Stanley PWM
New York

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lyon.polk@morganstanleypwm.com

\$15,414m Team Assets
\$50.0m Typical Account Size

Michael Poppo

UBS Financial Services Inc.
New York

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\$1,405m Team Assets
\$8.0m Typical Account Size

Shawn Rubin

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Morgan Stanley PWM
New York

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\$3,262m Team Assets
\$10.0m Typical Account Size

Richard Saperstein

Treasury Partners
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(917) 286-2777
rsaperstein@treasurypartners.com

\$11,598m Team Assets
\$20.0m Typical Account Size

William Schoff

UBS Financial Services
Rochester

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(585) 218-4568
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\$1,496m Team Assets
\$10.0m Typical Account Size

Ted Serure

J.P. Morgan Securities
New York

(212) 272-6448
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\$1,841m Team Assets
\$10.0m Typical Account Size

Evan Steinberg

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\$1,871m Team Assets
\$8.0m Typical Account Size

Ron Vinder

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New York

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\$6,741m Team Assets
\$50.0m Typical Account Size

Elizabeth Weikes

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\$3m Team Assets
\$25.0m Typical Account Size

OHIO

Rick Buoncore

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\$4,555m Team Assets
\$10.0m Typical Account Size

Randy Carver

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Mentor

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(440) 974-0808
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\$1,483m Team Assets
\$1.0m Typical Account Size

Charles Dankworth

UBS Financial Services, Inc.
New Albany

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(614) 939-2202
charles.dankworth@ubs.com

\$1,047m Team Assets
\$5.0m Typical Account Size

Kevin Myeroff

NCA Financial Planners
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(440) 473-1115
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\$1,678m Team Assets
\$2.5m Typical Account Size

Valerie Newell

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\$3,088m Team Assets
\$3.3m Typical Account Size

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graystone-consulting-the-robertson-group
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\$4,550m Team Assets
\$2.0m Typical Account Size

Daniel Roe

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\$2,790m Team Assets
\$4.8m Typical Account Size

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david_singer@ml.com

\$3,015m Team Assets
\$13.5m Typical Account Size

Linnell Sullivan

The Evelo/Singer/Sullivan Group,
Merrill PWM
Cincinnati

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\$1,411m Team Assets
\$5.0m Typical Account Size

OKLAHOMA**Jana Shoulders**

Mariner Wealth Advisors
Tulsa

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people/jana-shoulders
(918) 991-6910
jana.shoulders@marinerwealthadvisors.
com

\$1,142m Team Assets
\$6.2m Typical Account Size

OREGON**Judith McGee**

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Portland

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judith.mcgee@raymondjames.com

\$613m Team Assets
\$1.0m Typical Account Size

PENNSYLVANIA**Robb Boland**

RBC Wealth Management
Philadelphia

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robert.boland@rbc.com

\$1,265m Team Assets
\$5.0m Typical Account Size

Patti Brennan

Key Financial, Inc.
West Chester

keyfinancialinc.com
(610) 429-9050
pbrennan@keyfinancialinc.com

\$1,041m Team Assets
\$2.0m Typical Account Size

William Brown

Merrill
Sewickley

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william_brownjr@ml.com

\$1,110m Team Assets
\$4.0m Typical Account Size

Joseph Flotteron

Merrill
Yardley

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Joseph_Flotteron@ml.com

\$482m Team Assets
\$2.0m Typical Account Size

Joshua Gross

Mill Creek Capital Advisors
Conshohocken

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(610) 941-7700
jgross@millcreekcap.com

\$6,000m Team Assets
\$20.0m Typical Account Size

Michael Hirthler

Jacobi Capital Management, LLC
Wilkes Barre

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(570) 826-1801
mhirthler@jacobicapital.com

\$1,233m Team Assets
\$2.9m Typical Account Size

Barbara Hudock

Hudock Capital Group, LLC
Williamsport

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(570) 326-9500
bhudock@hudockcapital.com

\$526m Team Assets
\$1.0m Typical Account Size

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\$1,500m Team Assets
\$4.0m Typical Account Size

Peter Sargent

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Yardley

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\$687m Team Assets
\$2.0m Typical Account Size

Craig Schwartz

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\$942m Team Assets
\$2.5m Typical Account Size

John Solis-Cohen

Wells Fargo Advisors
Jenkintown

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\$1,191m Team Assets
\$5.0m Typical Account Size

RHODE ISLAND**Malcolm Makin**

Raymond James Financial Services
Westerly

ppgadvisors.com
(401) 596-2800
mmakin@ppgadvisors.com

\$1,289m Team Assets
\$1.5m Typical Account Size

Matthew Young

Richard C. Young & Co., Ltd.
Newport

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(401) 849-2137
info@younginvestments.com

\$1,057m Team Assets
\$1.7m Typical Account Size

SOUTH DAKOTA**Gordon Wollman**

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\$410m Team Assets
\$0.9m Typical Account Size

TENNESEE**Christi Edwards**

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\$813m Team Assets
\$4.0m Typical Account Size

Jason Pharris

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\$835m Team Assets
\$4.0m Typical Account Size

Trey Smith

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\$778m Team Assets
\$4.0m Typical Account Size

TEXAS**Bonner Barnes**

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\$1,030m Team Assets
\$0.8m Typical Account Size

Michael David

Carson Wealth
Amarillo

carsonwealth.com
(806) 372-4285
michael@pfgonline.net

\$7,400m Team Assets
\$5.0m Typical Account Size

J. Michael Fox

Merrill
Houston

fa.ml.com/fox_group
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jmichael_fox@ml.com

\$804m Team Assets
\$2.5m Typical Account Size

Ira Kravitz

UBS Financial Services
Plano

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ira.kravitz@ubs.com

\$788m Team Assets
\$5.0m Typical Account Size

Alexander Ladage

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Austin

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\$979m Team Assets
\$10.0m Typical Account Size

Tommy McBride

Merrill
Dallas

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(214) 750-2004
thomas_mcbride@ml.com

\$1,648m Team Assets
\$7.5m Typical Account Size

John Merrill

Tanglewood Total Wealth
Management
Houston

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(713) 840-8880
jmerrill@tanglewoodwealth.com

\$930m Team Assets
\$2.5m Typical Account Size

SPECIAL ADVERTISING SECTION

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Financial Advisor
Morgan Stanley
Dallas

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(214) 696-7175
marie.a.moore@morganstanley.com

\$489m Team Assets
\$2.0m Typical Account Size

Darrell Pennington

Pennington Wealth Management
Houston

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\$1,165m Team Assets
\$1.5m Typical Account Size

R. Scot Smith

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Morgan Stanley
Dallas

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scot.smith@morganstanley.com

\$595m Team Assets
\$3.0m Typical Account Size

Scott Tiras

Tiras Wealth Management
Houston

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scott.b.tiras@ampf.com

\$2,097m Team Assets
\$3.0m Typical Account Size

VIRGINIA

Garret Alcaraz

Wells Fargo Advisors
Virginia Beach

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(757) 431-6375
gary.alcaraz@wfadvisors.com

\$1,775m Team Assets
\$5.0m Typical Account Size

Tristan Caudron

Wells Fargo Advisors
Alexandria

CaudronMegaryBlackburn.com
(703) 739-4545
tristan.caudron@wfadvisors.com

\$1,671m Team Assets
\$1.8m Typical Account Size

Simon Hamilton

Baird
Reston

thewiseinvestorgroup.com
(571) 203-1600
gssmith@rwbaird.com

\$2,211m Team Assets
\$1.3m Typical Account Size

Michael Joyce

Agili
Richmond

agilipersonalcfo.com
(804) 358-2702
mjoyce@agilipersonalcfo.com

\$715m Team Assets
\$2.5m Typical Account Size

Soo Kim

Ameriprise Financial
Vienna

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soo.m.kim@ampf.com

\$1,569m Team Assets
\$1.3m Typical Account Size

Jeff LeClair

Wells Fargo Advisors
McLean

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jeff.leclair@wellsfargo.com

\$1,284m Team Assets
\$10.0m Typical Account Size

Joseph Montgomery

The Optimal Service Group of
Wells Fargo Advisors
Williamsburg

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joe.montgomery@wellsfargoadvisors.com

\$13,570m Team Assets
\$7.0m Typical Account Size

Paul Pagnato

PagnatoKarp
Reston

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(703) 468-2700
ppagnato@pagnatokarp.com

\$3,863m Team Assets
\$15.0m Typical Account Size

Gregory Smith

Baird
Reston

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\$2,211m Team Assets
\$1.3m Typical Account Size

Ryan Sprowls

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Group of Wells Fargo Advisors
Alexandria

AlexandriaWMG.com
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ryan.sprows@wellsfargoadvisors.com

\$1,140m Team Assets
\$2.0m Typical Account Size

Greg Sullivan

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Blayney, LLC
McLean

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(703) 734-9300
greg.sullivan@sbsbllc.com

\$3,950m Team Assets
\$5.0m Typical Account Size

WASHINGTON

Shari Burns

United Capital Seattle
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paragon@unitedcp.com

\$1,819m Team Assets
\$5.9m Typical Account Size

Lawrence Hood

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(206) 623-6641
larry@pacific-portfolio.com

\$3,793m Team Assets
\$13.2m Typical Account Size

Randall Linde

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(425) 228-1000
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\$2,089m Team Assets
\$0.9m Typical Account Size

Michael Matthews

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\$1,120m Team Assets
\$4.0m Typical Account Size

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\$2,120m Team Assets
\$0.7m Typical Account Size

WISCONSIN

Andrew Burish

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Madison

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\$3,762m Team Assets
\$2.0m Typical Account Size

Michael Smith

Michael Smith & Associates
Stevens Point

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(715) 341-6657
michael.e.smith@ampf.com

\$520m Team Assets
\$0.9m Typical Account Size

David Spano

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Elm Grove

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\$2,107m Team Assets
\$0.8m Typical Account Size

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