

# BARRON'S TOP ADVISOR GUIDE

This section is a reprint of select advisors from our four annual financial advisor rankings. For more information on them and other ranked advisors, visit [barrons.com/directory](http://barrons.com/directory).

## ABOUT THIS SECTION

This guide provides readers with expanded details on Barron's-ranked advisors. Barron's publishes four individual advisor rankings each year along with three team- or firm-based rankings. All advisors appearing here are eligible because they have appeared in a Barron's wealth-management ranking in the preceding year. Advisors pay a fee to be listed in this special section, but their participation has no bearing on future rankings.

## HOW ARE ADVISORS RANKED?

Advisors who wish to be ranked fill out a comprehensive application 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. 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. This benchmark minimizes bias and human error in our process.

## HOW DO I FIND AN ADVISOR?

Barron's 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.

## ALABAMA

### Robert Runkle

Merrill Lynch  
Montgomery  
robert\_runkle@ml.com  
(334) 409-5810  
fa.ml.com/Robert\_Runkle  
**\$1.5m** Typical Account Size  
**\$1,338m** Total Assets

### Brian Crawford

Wells Fargo Advisors  
Tucson  
brian.crawford@wfadvisors.com  
(520) 615-8463  
home.wellsfargoadvisors.com/  
brian.crawford  
**\$1.5m** Typical Account Size  
**\$1,100m** Total Assets

### Glenn Pahnke

RBC Wealth Management  
Scottsdale  
glenn.pahnke@rbc.com  
(480) 609-4901  
us.rbcwealthmanagement.com/  
pahnkewealthmanagement  
group  
**\$3.5m** Typical Account Size  
**\$1,181m** Total Assets

### Ruth Transue

Wells Fargo Advisors  
Tucson  
transuer@wellsfargo.com  
(520) 529-5932  
fa.wellsfargoadvisors.com/  
ruth-transue  
**\$2m** Typical Account Size  
**\$680m** Total Assets

### Emily Bach

The Bach Group at Morgan  
Stanley  
Orinda  
emily.bach@morganstanley.com  
(925) 253-5322  
fa.morganstanley.com/  
thebachgroup  
**\$4m** Typical Account Size  
**\$1,084m** Total Assets

### Steven Check

Check Capital Management Inc.  
Costa Mesa  
scheck@checkcapital.com  
(714) 641-3579  
checkcapital.com  
**\$1m** Typical Account Size  
**\$1,459m** Total Assets

## ARIZONA

### Robert Bancroft

Morgan Stanley Private Wealth  
Scottsdale  
robert.bancroft@  
morganstanleypwm.com  
(480) 624-5714  
advisor.morganstanley.com/  
bbsg  
**\$20m** Typical Account Size  
**\$1,314m** Total Assets

### Joe Di Vito

RBC Wealth Management  
Private Client Group  
Phoenix  
joe.divito@rbc.com  
(602) 381-5340  
thedivitoconsultinggroup.com  
**\$2m** Typical Account Size  
**\$470m** Total Assets

### David Stahle

Merrill Lynch  
Gilbert  
david\_stahle@ml.com  
(480) 752-6435  
fa.ml.com/sbgroupaz  
**\$3m** Typical Account Size  
**\$2,557m** Total Assets

### Trevor Wilde

Wilde Wealth Management  
Group  
Scottsdale  
trevor@wildewealth.com  
(480) 361-6203  
wildewealth.com  
**\$0.65m** Typical Account Size  
**\$1,160m** Total Assets

### Anouchka Balog

Morgan Stanley  
Laguna Niguel  
anouchka.m.balog@  
morganstanley.com  
(949) 365-5306  
advisor.morganstanley.com/  
the-balog-group  
**\$5m** Typical Account Size  
**\$637m** Total Assets

### Randy Conner

Churchill Management Group  
Los Angeles  
info@churchillmanagement.com  
(877) 937-7110  
churchillmanagement.com  
**\$1m** Typical Account Size  
**\$5,540m** Total Assets

### James Marten

Merrill Lynch  
Phoenix  
james\_marten@ml.com  
(602) 954-5016  
fa.ml.com/martengroup  
**\$3.5m** Typical Account Size  
**\$2,319m** Total Assets

### Mark Stein

Galvin, Gaustad & Stein  
Scottsdale  
mark@ggsadvisors.com  
(480) 776-1440  
ggsadvisors.com  
**\$1.52m** Typical Account Size  
**\$402m** Total Assets

## CALIFORNIA

### Matthew Babrick

First Republic Investment  
Management  
Los Angeles  
mbabrick@firstrepublic.com  
(310) 788-3739  
firstrepublic.com/all-profiles/  
matthew-babrick  
**\$30m** Typical Account Size  
**\$3,396m** Total Assets

### Jim Berliner

Westmount Asset Management  
Los Angeles  
jberliner@westmount.com  
(310) 556-2502  
westmount.com  
**\$3.5m** Typical Account Size  
**\$3,367m** Total Assets

### Lisa Detanna

Raymond James  
Beverly Hills  
lisa.detanna@  
raymondjames.com  
(310) 285-4506  
globalwealthsolutionsgroup  
**\$5m** Typical Account Size  
**\$3,871m** Total Assets

### Michael Butt

Morgan Stanley  
Scottsdale  
michael.butt@ms.com  
(480) 368-6565  
advisor.morganstanley.com/  
michael.butt  
**\$2.11m** Typical Account Size  
**\$735m** Total Assets

**Fred Fern**  
Churchill Management Group  
Los Angeles

fredafern@churchillmanagement.com  
(877) 937-7110  
churchillmanagement.com

**\$1m** Typical Account Size  
**\$5,540m** Total Assets

### Philippe Hartl

Merrill Lynch Wealth Management  
Century City

philippe\_hartl@ml.com  
(310) 407-3984  
pwa.ml.com/hartl\_team

**\$45m** Typical Account Size  
**\$5,464m** Total Assets

### Seth Hays

Morgan Stanley  
Westlake Village

seth.hays@morganstanley.com  
(805) 494-0215  
advisor.morganstanley.com/the-oaks-group

**\$3.5m** Typical Account Size  
**\$1,318m** Total Assets

### Richard Jones

Merrill Lynch-Private Wealth Mgmt  
Los Angeles

Richardb\_jones@ml.com  
(310) 407-4925  
pwa.ml.com/joneszafarigroup

**\$50m** Typical Account Size

**\$15,772m** Total Assets

### Elaine Meyers

J.P. Morgan Securities  
San Francisco

elaine.meyers@jpmorgan.com  
(415) 315-7801  
jpmorgansecurities.com/elainemeyers

**\$50m** Typical Account Size  
**\$3,048m** Total Assets

### Greg Onken

J.P. Morgan Securities  
San Francisco

greg.onken@jpmorgan.com  
(415) 772-3123  
jpmorgansecurities.com/os-group

**\$15m** Typical Account Size  
**\$3,500m** Total Assets

### George Papadoyannis

Ameriprise Financial Services  
San Mateo

george.x.papadoyannis@ampf.com  
(650) 593-9170  
papadoyannisandassociates.com

**\$3m** Typical Account Size  
**\$1,900m** Total Assets

### Laila Pence

Pence Wealth Management  
Newport Beach

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

**\$2.5m** Typical Account Size  
**\$2,053m** Total Assets

### Darren Pfefferman

Morgan Stanley Private Wealth  
San Diego

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

**\$10m** Typical Account Size  
**\$1,657m** Total Assets

### Spuds Powell

Kayne Anderson Rudnick  
Investment Management  
Los Angeles

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

**\$8.5m** Typical Account Size  
**\$30,216m** Total Assets

### Frank Reilly

Reilly Financial Advisors  
La Mesa

frank.reilly@rfadvisors.com  
(800) 682-3237  
rfadvisors.com

**\$2m** Typical Account Size  
**\$2,257m** Total Assets

### Deb Wetherby

Wetherby Asset Management  
San Francisco

deb@wetherby.com  
(415) 399-9159  
wetherby.com

**\$33.35m** Typical Account Size  
**\$5,394m** Total Assets

### Alan Whitman

Morgan Stanley Wealth Management  
Pasadena

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

**\$5m** Typical Account Size  
**\$3,102m** Total Assets

### Dale Yahnke

Dowling & Yahnke Wealth Advisors  
San Diego

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

**\$4.2m** Typical Account Size  
**\$4,468m** Total Assets

### Cheryl L. Young

Morgan Stanley  
Los Gatos

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

**\$5m** Typical Account Size  
**\$2,015m** Total Assets

## COLORADO

### Mark Brown

Brown & Company  
Denver

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

**\$6.2m** Typical Account Size  
**\$510m** Total Assets

### Melissa Corrado Harrison

UBS Financial Services  
melissa.harrison@ubs.com  
(303) 820-5770

financialservicesinc.ubs.com/team/corrado-harrison  
**\$25m** Typical Account Size  
**\$1,218m** Total Assets

### Shawn Fowler

Morgan Stanley Private Wealth  
Denver

shawn.fowler@morganstanley.com  
(303) 446-3306  
pwm.morganstanley.com/fowlerbull

**\$35m** Typical Account Size  
**\$4,033m** Total Assets

### Carl Hoover

Merrill Lynch Private Banking & Investment Group  
Denver

Carl\_Hoover@ml.com  
(720) 941-2033  
pwa.ml.com/thehtteam

**\$15m** Typical Account Size  
**\$2,391m** Total Assets

### Joseph Janiczek

Janiczek Wealth Management  
Denver

cwegner@janiczek.com  
(303) 721-7000  
janiczek.com

**\$2.5m** Typical Account Size  
**\$625m** Total Assets

### Wally Obermeyer

Obermeyer Wood Investment Counsel  
Aspen/Denver

wally@obermeyerwood.com  
(970) 925-8747  
obermeyerwood.com

**\$3m** Typical Account Size  
**\$1,550m** Total Assets

### Scott Thisted

Merrill Private Wealth Mgmt  
Denver

scott\_thisted@ml.com  
(720) 941-2034  
pwa.ml.com/thehtteam

**\$15m** Typical Account Size  
**\$2,391m** Total Assets

## CONNECTICUT

### Peter Chieco

Morgan Stanley  
Greenwich

peter.chieco@morganstanley.com  
(203) 625-4897  
morganstanleyfa.com/thesoundshoregroup

**\$7m** Typical Account Size  
**\$2,111m** Total Assets

### David Goodwin

Merrill Lynch  
Hartford

david\_goodwin@ml.com  
(800) 998-9837  
fa.ml.com/goodwin\_group

**\$7m** Typical Account Size  
**\$722m** Total Assets

### William Greco

UBS Financial Services  
Hartford

william.greco@ubs.com  
(860) 727-1515  
ubs.com/team/grecogroup

**\$10m** Typical Account Size  
**\$3,992m** Total Assets

### Thomas Markey

Morgan Stanley  
Stamford

thomas.markey@morganstanley.com  
(203) 967-7049  
fa.morganstanley.com/themarkeygroup

**\$5m** Typical Account Size  
**\$1,072m** Total Assets

### Charles J. Noble, III

Janney Montgomery Scott  
New Haven

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

**\$6m** Typical Account Size  
**\$1,005m** Total Assets

### Harold Trischman

Morgan Stanley  
Greenwich

harold.j.trischman@morganstanley.com  
(203) 625-4824  
fa.morganstanley.com/trischmangroup

**\$5m** Typical Account Size  
**\$2,242m** Total Assets

## DELAWARE

### Michael Koppenhaver

Merrill Lynch  
Dover

michael\_s\_koppenhaver@ml.com  
(302) 736-7743  
fa.ml.com/Koppenhaver\_Hawkins\_Associates

**\$2m** Typical Account Size  
**\$737m** Total Assets

### Peni Warren

Merrill Lynch  
Dover

peni\_warren@ml.com  
(302) 736-7710  
fa.ml.com/delaware/dover/the\_warren\_group

**\$1.5m** Typical Account Size  
**\$684m** Total Assets

## WASHINGTON, D.C.

### Michael Freiman

Morgan Stanley Wealth Management  
Washington, D.C.

michael.j.freiman@morganstanley.com  
(202) 778-1382  
teamfreiman.com

**\$1.25m** Typical Account Size  
**\$1,628m** Total Assets

### Gregory Marcus

UBS Financial Services  
Washington, D.C.

gregory.marcus@ubs.com  
(202) 942-2830  
financialservicesinc.ubs.com/team/marcushendlerstern/meetourteam

**\$30m** Typical Account Size  
**\$732m** Total Assets

### Marvin McIntyre

Morgan Stanley Private Wealth  
Washington, D.C.

Marvin.mcintyre@morganstanleypwm.com  
(202) 778-1381  
advisor.morganstanley.com/cwmg

**\$8.5m** Typical Account Size  
**\$3,951m** Total Assets

## FLORIDA

### Richard Altieri

Morgan Stanley  
Boca Raton

richard.altieri@morganstanley.com  
(561) 393-1836  
fa.morganstanley.com/thealtierigroup

**\$5m** Typical Account Size  
**\$959m** Total Assets

### Louise Armour

J.P. Morgan Securities  
Palm Beach Gardens

louise.armour@jpmorgan.com  
(800) 926-6604  
jpmorgansecurities.com/armour

**\$10m** Typical Account Size  
**\$4,200m** Total Assets

**FLORIDA, CONT.****Peter Bermont**

Raymond James  
Coral Gables  
peter.bermont@raymondjames.com  
(305) 446-6600  
Bermontadvisorygroup.com  
**\$15m** Typical Account Size  
**\$2,160m** Total Assets

**Ralph Byer**

Merrill Lynch  
Plantation  
Ralph\_Byer@ml.com  
(954) 916-2816  
fa.ml.com/byer\_wealth\_mgmt  
**\$5.35m** Typical Account Size  
**\$663m** Total Assets

**Adam E. Carlin**

Morgan Stanley Private Wealth  
Coral Gables  
adam.e.carlin@morganstanleypwm.com  
(305) 476-3302  
fa.morganstanley.com/adam.e.carlin  
**\$20m** Typical Account Size  
**\$3,084m** Total Assets

**Louis Chiavacci**

Merrill Private Wealth Mgmt  
Coral Gables  
louis\_chiavacci@ml.com  
(305) 774-0501  
pwa.ml.com/ChiavacciTeam  
**\$35m** Typical Account Size  
**\$3,627m** Total Assets

**Aimee Cogan**

Morgan Stanley  
Sarasota  
Aimee.Cogan@morganstanley.com  
(941) 363-8513  
advisor.morganstanley.com/the-bellwether-group  
**\$10m** Typical Account Size  
**\$1,066m** Total Assets

**Stephen Curley**

WaterOak Advisors  
Winter Park  
barrons@wateroak.com  
(407) 567-2956  
wateroak.com  
**\$12.5m** Typical Account Size  
**\$2,114m** Total Assets

**Don d'Adesky**

Raymond James  
Boca Raton  
don.dadesky@raymondjames.com  
(561) 981-3690  
raymondjames.com/theamericasgroup  
**\$5m** Typical Account Size  
**\$4,026m** Total Assets

**Erick Ellsweig**

Merrill Lynch  
West Palm Beach  
Erick\_Ellsweig@ml.com  
(561) 514-4832  
fa.ml.com/KMandAssociates  
**\$3.5m** Typical Account Size  
**\$1,456m** Total Assets

**John Elwaw**

Morgan Stanley  
Miami  
john.elwaw@ms.com  
(305) 376-2408  
morganstanleyfa.com/theelwawcavalierigroup/groupdetail.htm  
**\$10m** Typical Account Size  
**\$1,271m** Total Assets

**Janet Franco Gordon**

Morgan Stanley  
Coral Gables  
janet.franco.gordon@morganstanley.com  
(305) 476-3304  
fa.morganstanley.com/thegordongroup  
**\$6.5m** Typical Account Size  
**\$872m** Total Assets

**Trevor Fried**

Morgan Stanley  
Fort Lauderdale  
trevor.fried@morganstanley.com  
(954) 713-8436  
advisor.morganstanley.com/the-las-olas-group  
**\$2m** Typical Account Size  
**\$814m** Total Assets

**Eric Glasband**

Merrill Lynch  
Boca Raton  
eric.glasband@ml.com  
(561) 361-3437  
fa.ml.com/gs  
**\$4.7m** Typical Account Size  
**\$1,103m** Total Assets

**Keith Jacoby**

Jacoby Nealon & McCain Wealth  
Management Group of Wells  
Fargo Advisors  
Naples  
keith.jacoby@wellsfargoadvisors.com  
(239) 254-2220  
jacobynealonmccainwmg.com  
**\$10m** Typical Account Size  
**\$2,099m** Total Assets

**William King**

Merrill Lynch Wealth  
Management  
Vero Beach  
william\_w.king@ml.com  
(772) 231-9037  
fa.ml.com/new-york/new-york/the-king-group  
**\$8m** Typical Account Size  
**\$1,031m** Total Assets

**Trent Leyda**

Morgan Stanley  
Vero Beach  
Trent.Leyda@morganstanley.com  
(772) 234-1805  
advisor.morganstanley.com/the-leyda-group  
**\$5m** Typical Account Size  
**\$1,271m** Total Assets

**Scott Macaione**

WaterOak Advisors  
Winter Park  
barrons@wateroak.com  
(407) 567-2956  
wateroak.com  
**\$3m** Typical Account Size  
**\$2,114m** Total Assets

**Michael McCain**

Jacoby Nealon & McCain Wealth  
Management Group of Wells  
Fargo Advisors  
Naples  
michael.mccain@wfadvisors.com  
(239) 254-2206  
jacobynealonmccainwmg.com  
**\$10m** Typical Account Size  
**\$2,099m** Total Assets

**William Merriam**

Merrill Lynch Wealth  
Management  
Jacksonville  
william\_h\_merriam@ml.com  
(904) 218-5931  
fa.ml.com/bill\_merriam  
**\$2m** Typical Account Size  
**\$1,040m** Total Assets

**Thomas Moran**

Moran Wealth Mgmt at Wells  
Fargo Financial Network  
Naples  
Thomas.Moran@moranwm.com  
(239) 920-4440  
moranwm.com  
**\$5m** Typical Account Size  
**\$3,296m** Total Assets

**Daryn Pingleton**

Merrill Lynch  
West Palm Beach  
daryn\_pingleton@ml.com  
(561) 514-4817  
fa.ml.com/florida/west-palm-beach/pingleton\_group  
**\$4m** Typical Account Size  
**\$929m** Total Assets

**Scott Pinkerton**

FourThought Private Wealth  
Venice  
scottpinkerton@fourthought.com  
(866) 209-8557  
fourthought.com  
**\$5.54m** Typical Account Size  
**\$1,122m** Total Assets

**Andrew Schultz**

Morgan Stanley Private Wealth  
Management  
Miami Beach  
andrew.schultz@morganstanleypwm.com  
(305) 695-6116  
fa.morganstanley.com/theschultzgroup  
**\$10m** Typical Account Size  
**\$773m** Total Assets

**Michael Silver**

Baron Silver Stevens Financial  
Advisors  
Boca Raton  
msilver@bssf.com  
(561) 447-1997  
bssf.com  
**\$1m** Typical Account Size  
**\$650m** Total Assets

**Marc Singer**

Mariner Wealth Advisors  
Coral Gables  
marc.singer@marinerwealthadvisors.com  
(305) 443-0060  
marinerwealthadvisors.com  
**\$2.75m** Typical Account Size  
**\$1,597m** Total Assets

**Faith Xenos**

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

**GEORGIA****Robert Balentine**

Balentine  
Atlanta  
rbalentine@balentine.com  
(404) 537-4801  
balentine.com  
**\$18.3m** Typical Account Size  
**\$3,515m** Total Assets

**Andy Berg**

Homrich Berg  
Atlanta  
Info@HomrichBerg.com  
(404) 264-1400  
homrichberg.com  
**\$3.5m** Typical Account Size  
**\$6,109m** Total Assets

**Roger Green**

Green Financial Resources, LLC  
Duluth  
gfrappt@rogersgreen.com  
(770) 931-1414  
rogersgreen.com  
**\$0.22m** Typical Account Size  
**\$492m** Total Assets

**Michael Hines**

Consolidated Planning  
Corporation  
Atlanta  
mhines@cpcadvisors.com  
(404) 892-1995  
cpcadvisors.com  
**\$2.5m** Typical Account Size  
**\$776m** Total Assets

**Wes Moss**

Capital Investment Advisors  
Atlanta  
wmoss@yourwealth.com  
(404) 531-0018  
yourwealth.com  
**\$1.5m** Typical Account Size  
**\$2,650m** Total Assets

**ILLINOIS****Kyle Chudom**

Morgan Stanley  
Oak Brook  
kyle.chudom@morganstanley.com  
(630) 573-9680  
chudomhayes.com  
**\$1m** Typical Account Size  
**\$930m** Total Assets

**Brad DeHond**

Morgan Stanley Private Wealth  
Chicago  
brad.dehond@morganstanleypwm.com  
(312) 453-9111  
advisor.morganstanley.com/moriarity-dehond-mulka  
**\$40m** Typical Account Size  
**\$1,837m** Total Assets

**Daniel Fries**

Merrill Lynch  
Chicago  
daniel.fries@ml.com  
(312) 696-2121  
fa.ml.com/illinois/chicago/frieswealthmanagement  
**\$3m** Typical Account Size  
**\$1,021m** Total Assets

**Tom Kilborn**

Merrill Lynch  
Northbrook  
tom\_kilborn@ml.com  
(847) 564-7201  
fa.ml.com/illinois/northbrook/kilbornrgroup  
**\$4m** Typical Account Size  
**\$1,047m** Total Assets

**Kathleen Roeser**

Morgan Stanley  
Chicago  
kathy.roeser@morganstanley.com  
(312) 443-6500  
fa.morganstanley.com/theroesergroup  
**\$8m** Typical Account Size  
**\$1,310m** Total Assets

**David Sheppard**

Merrill Lynch  
Deer Park  
david\_n\_sheppard@ml.com  
(847) 550-7878  
fa.ml.com/  
thorndykesheppardgroup  
**\$6m** Typical Account Size  
**\$859m** Total Assets

**Joseph Silich**

Morgan Stanley  
Chicago  
Joseph.silich@  
morganstanley.com  
(312) 443-6200  
fa.morganstanley.com/  
thesilichgroup  
**\$7m** Typical Account Size  
**\$1,066m** Total Assets

**Mark Thorndyke**

Merrill Lynch Wealth  
Management  
Chicago  
mark\_w\_thorndyke@ml.com  
(312) 696-7645  
fa.ml.com/  
ThorndykeSheppardGroup  
**\$8m** Typical Account Size  
**\$1,399m** Total Assets

**Philip Watson**

Ameriprise Financial  
Downers Grove  
philip.j.watson@ampf.com  
(630) 541-5300  
ameripriseadvisors.com/  
philip.j.watson  
**\$0.98m** Typical Account Size  
**\$2,290m** Total Assets

**David Wright**

Merrill Private Wealth  
Management  
Chicago  
dave\_wright@ml.com  
(312) 325-2620  
pwa.ml.com/wrighthudakzabel  
**\$25m** Typical Account Size  
**\$2,383m** Total Assets

**INDIANA****Trent Cowles**

Merrill Lynch  
Indianapolis  
trent\_cowles@ml.com  
(317) 624-8451  
fa.ml.com/cf  
**\$3.2m** Typical Account Size  
**\$865m** Total Assets

**IOWA****Jerry Ask**

Jerry K. Ask Investment  
Services  
Cedar Rapids  
jerry.ask@jkainvest.com  
(319) 395-9230  
jkainvest.com  
**\$0.48m** Typical Account Size  
**\$408m** Total Assets

**Timothy Finucan**

Edward Jones  
Webster City  
timothy.finucan@  
edwardjones.com  
(515) 832-4155  
edwardjones.com/timothy-  
finucan  
**\$0.75m** Typical Account Size  
**\$602.75m** Total Assets

**Matt Fryar**

Wells Fargo Advisors  
Des Moines  
matthew.r.fryar@  
wellsfargo.com  
(515) 245-3120  
fa.wellsfargoadvisors.com/  
matthew-fryar  
**\$5m** Typical Account Size  
**\$780m** Total Assets

**KANSAS****Trey Barnes**

Mariner Wealth Advisors  
Overland Park  
trey.barnes@  
marinerwealthadvisors.com  
(913) 387-2734  
marinerwealthadvisors.com/  
why-us/people/trey-barnes  
**\$1.81m** Typical Account Size  
**\$1,697m** Total Assets

**KENTUCKY****Barry Barlow**

Merrill Lynch  
Louisville  
barry\_barlow@ml.com  
(502) 329-5097  
fa.ml.com/b\_barlow  
**\$4m** Typical Account Size  
**\$882m** Total Assets

**Travis Musgrave**

Merrill Lynch  
Lexington  
travis\_musgrave@ml.com  
(859) 231-5258  
fa.ml.com/Musgrave  
**\$5m** Typical Account Size  
**\$652m** Total Assets

**LOUISIANA****Rick Frayard**

UBS Financial Services  
Lafayette  
rick.frayard@ubs.com  
(337) 593-3600  
ubs.com/team/epg  
**\$1.75m** Typical Account Size  
**\$2,267m** Total Assets

**MAINE****Jeremiah Burns**

Morgan Stanley  
Portland  
jeremiah.burns@  
morganstanleypwm.com  
(207) 871-7373  
advisor.morganstanley.com/  
jeremiah.burns  
**\$5m** Typical Account Size  
**\$491m** Total Assets

**Todd Doolan**

Morgan Stanley  
Portland  
todd.h.doolan@  
morganstanley.com  
(207) 771-0812  
advisor.morganstanley.com/  
the-doolan-eldredge-group  
**\$1.9m** Typical Account Size  
**\$388m** Total Assets

**MARYLAND****Patricia Baum**

RBC Wealth Management  
Annapolis  
patricia.baum@rbc.com  
(410) 573-6717  
baumjackson.com  
**\$3m** Typical Account Size  
**\$1,457m** Total Assets

**Larry Boggs**

Wells Fargo Advisors  
Cumberland  
larry.d.boggs@wfadvisors.com  
(301) 724-2660  
fa.wellsfargoadvisors.com/  
boggs-wealth-management  
**\$3m** Typical Account Size  
**\$1,167m** Total Assets

**Robert Collins**

Collins Investment Group  
Bethesda  
robert.collins@  
collinsinvestmentgroup.com  
(301) 915-9630  
collinsinvestmentgroup.com  
**\$2.5m** Typical Account Size  
**\$894m** Total Assets

**Barry Garber**

Alex. Brown, a division of  
Raymond James  
Baltimore  
Barry.Garber@alexbrown.com  
(410) 525-6210  
alexbrown.com/  
garberwealthmanagementteam  
**\$15m** Typical Account Size  
**\$3,289m** Total Assets

**Brian Kroneberger**

RBC Wealth Management  
Hunt Valley  
brian.kroneberger@rbc.com  
(410) 316-5454  
thekronebergergroup.com  
**\$3m** Typical Account Size  
**\$1,100m** Total Assets

**Kent Pearce**

Merrill Lynch  
Towson  
kent\_pearce@ml.com  
(410) 321-4340  
fa.ml.com/pearce\_group  
**\$7m** Typical Account Size  
**\$1,739m** Total Assets

**Robert Scherer**

Graystone Consulting  
Potomac  
robert.s.scherer@  
msgraystone.com  
(301) 279-6403  
graystone.morganstanley.  
com/graystone-consulting-  
metropolitan-washington-d-c  
**\$25m** Typical Account Size  
**\$9,500m** Total Assets

**E. Geoffrey Sella**

SPC Financial, Inc.  
Rockville  
esella@spcfinancial.com  
(301) 770-6800  
spcfinancial.com  
**\$0.85m** Typical Account Size  
**\$858m** Total Assets

**MASSACHUSETTS****Charles S. Bean III**

Heritage Financial Services  
Westwood  
cbean@heritagefinancial.net  
(781) 619-1302  
heritagefinancial.net  
**\$3m** Typical Account Size  
**\$1,520m** Total Assets

**Debra Brede**

D.K. Brede Investment  
Management  
Needham  
brede@bredeinvestment.com  
(781) 444-9367  
bredeinvestment.com  
**\$2m** Typical Account Size  
**\$1,018m** Total Assets

**Kevin Grimes**

Grimes & Company, Inc.  
Westborough  
advisors@grimesco.com  
(508) 366-3883  
grimesco.com  
**\$3m** Typical Account Size  
**\$2,900m** Total Assets

**Susan Kaplan**

Kaplan Financial Services, Inc.  
Newton  
susan.kaplan@lpl.com  
(617) 527-1557  
kaplan-financial.com/splash.  
cfm  
**\$3.5m** Typical Account Size  
**\$2,176m** Total Assets

**Victor T. Livingstone**

Morgan Stanley Private Wealth  
Boston  
victor.livingstone@  
morganstanleypwm.com  
(617) 478-6500  
**\$25m** Typical Account Size  
**\$1,346m** Total Assets

**Peter Noonan**

J.P. Morgan Securities  
Boston  
peter.noonan@jpmorgan.com  
(617) 654-2318  
jpmorgansecurities.com/  
peternoonan  
**\$15m** Typical Account Size  
**\$2,514m** Total Assets

**Raju Pathak**

Morgan Stanley  
Boston  
raju.pathak@ms.com  
(617) 589-3373  
fa.morganstanley.com/  
pathakgroup  
**\$8m** Typical Account Size  
**\$807m** Total Assets

**Peter Princi**

Morgan Stanley Graystone  
Boston  
peter.b.princi@  
msgraystone.com  
(617) 589-3229  
fa.morganstanley.com/  
theprincigroup  
**\$10m** Typical Account Size  
**\$6,950m** Total Assets

**Ira Rapaport**

New England Private Wealth  
Advisors, LLC  
Wellesley  
ira.rapaport@nepwealth.com  
(781) 416-1700  
nepwealth.com  
**\$5m** Typical Account Size  
**\$2,054m** Total Assets

**Raj Sharma**

Merrill - Private Wealth Mgmt  
Boston  
raj\_sharma@ml.com  
(617) 946-8030  
pwa.ml.com/sharma\_group  
**\$10m** Typical Account Size  
**\$7,381m** Total Assets

**Brian Strachan**

Morgan Stanley Private Wealth  
Boston  
brian.s.strachan@  
morganstanleypwm.com  
(617) 570-9240  
pwm.morganstanley.com/  
thestrachangroups  
**\$10m** Typical Account Size  
**\$2,975m** Total Assets

**MASSACHUSETTS,  
CONT.****Mark Winthrop**

Winthrop Wealth  
Westborough  
mark.winthrop@  
winthropwealth.com  
(508) 836-5500  
winthropwealth.com

**\$3.5m** Typical Account Size  
**\$1,545m** Total Assets

**MICHIGAN****Nicole Christians**

Merrill Lynch  
Farmington Hills  
nicole.christians@ml.com  
(248) 488-5047  
fa.ml.com/kulhavi

**\$1m** Typical Account Size  
**\$2,193m** Total Assets

**Jeffrey Fratarcangeli**

Fratarcangeli Wealth  
Management  
Birmingham  
jeffrey.fratarcangeli@  
wfafinet.com  
(248) 385-5050  
fratarcangeliwealth  
management.com

**\$8m** Typical Account Size  
**\$1,800m** Total Assets

**James Kruzan**

Kaydan Wealth Management,  
Inc.  
Fenton  
jim.kruzan@kaydanwealth.com  
(810) 593-1624  
KaydanWealthManagement.  
com/

**\$1.5m** Typical Account Size  
**\$511m** Total Assets

**David Kudla**

Mainstay Capital Management  
Grand Blanc  
mainstay@mainstaycapital.com  
(866) 444-6246  
mainstaycapital.com

**\$0.75m** Typical Account Size  
**\$2,583m** Total Assets

**Leo Stevenson**

Merrill Lynch  
Wyandotte  
leo.stevenson@ml.com  
(734) 324-3826  
fa.ml.com/wyandottegroup  
**\$1.5m** Typical Account Size  
**\$709m** Total Assets

**Charles C. Zhang**

Zhang Financial  
Portage  
charles.zhang@  
zhangfinancial.com  
(269) 385-5888  
zhangfinancial.com

**\$2m** Typical Account Size  
**\$3,606m** Total Assets

**MINNESOTA****Aaron Howe**

RBC Wealth Management  
Wayzata  
aaron.howe@rbc.com  
(952) 261-3561  
bigwatergroup.com  
**\$5m** Typical Account Size  
**\$687m** Total Assets

**Ben Marks**

Marks Group Wealth  
Management  
Minnetonka  
ben.marks@marksgroup.com  
(952) 582-6100  
marksgroup.com  
**\$2m** Typical Account Size  
**\$1,366m** Total Assets

**David A. Olson**

The BlackRidge Group at  
Morgan Stanley  
Rochester  
david.a.olson@morganstanley.  
com  
(507) 269-7542  
fa.morganstanley.com/  
blackridgegroup

**\$3.5m** Typical Account Size  
**\$555m** Total Assets

**MISSOURI****Michael Moeller**

Wells Fargo Advisors  
Chesterfield  
mike.moeller@wfadvisors.com  
(636) 530-6111  
themoellergroup.net

**\$3m** Typical Account Size  
**\$1,830m** Total Assets

**Kathleen Youngerman**

Morgan Stanley Private Wealth  
Chesterfield  
Kathleen.L.Youngerman@  
morganstanleypwm.com  
(314) 889-4862  
pwm.morganstanley.com/  
harmonyfamilyoffice  
**\$20m** Typical Account Size  
**\$350m** Total Assets

**NEBRASKA****Jason Dworak**

UBS Financial Services  
Lincoln  
jason.dworak@ubs.com  
(402) 328-2077  
financialservicesinc.ubs.com/  
team/dworakgroup

**\$8m** Typical Account Size  
**\$852m** Total Assets

**Jim Siemonsma**

Mariner Wealth Advisors  
Omaha  
jim.siemonsma@  
marinerwealthadvisors.com  
(402) 829-3650  
marinerwealthadvisors.com

**\$0.97m** Typical Account Size  
**\$1,138m** Total Assets

**Paul West**

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

**\$5.4m** Typical Account Size  
**\$4,586m** Total Assets

**NEVADA****Deborah Danielson**

Danielson Financial Group |  
LPL  
Las Vegas  
Deborah@  
DanielsonFinancialGroup.com  
(702) 734-7000  
danielsonfinancialgroup.com/  
homepage

**\$2m** Typical Account Size  
**\$694m** Total Assets

**Randy Garcia**

The Investment Counsel  
Company  
Las Vegas  
rgarcia@iccnv.com  
(702) 871-8510  
iccnv.com  
**\$4.8m** Typical Account Size  
**\$1,234m** Total Assets

**James Small**

UBS Financial Services  
Las Vegas  
jim.small@ubs.com  
(702) 792-3125  
financialservicesinc.ubs.com/  
team/jimsmall  
**\$1.9m** Typical Account Size  
**\$1,079m** Total Assets

**NEW HAMPSHIRE****John Habig**

Morgan Stanley  
Portsmouth  
john.f.habig@morganstanley.  
com  
(603) 422-8901  
morganstanleyfa.com/habig  
**\$1.5m** Typical Account Size  
**\$420m** Total Assets

**P. Kevin O'Brien**

Wells Fargo Advisors  
Portsmouth  
kevin.obrien@  
wellsfargoadvisors.com  
(603) 334-4032  
obrienwmg.com

**\$1.7m** Typical Account Size  
**\$387m** Total Assets

**NEW JERSEY****Bruce Barth**

Merrill Lynch  
Short Hills  
bruce.g.barth@ml.com  
(973) 564-7740  
fa.ml.com/barthgroup  
**\$2m** Typical Account Size  
**\$1,351m** Total Assets

**Francis Bitterly**

Morgan Stanley  
Red Bank  
francis.g.bitterly@ms.com  
(732) 224-3754  
fa.morganstanley.com/  
francisbitterly

**\$2.8m** Typical Account Size  
**\$456m** Total Assets

**David Briegs**

Merrill Lynch  
Bridgewater  
David.Briegs@ml.com  
(908) 685-3203  
fa.ml.com/kugelbriegs  
**\$2.5m** Typical Account Size  
**\$1,616m** Total Assets

**Jack Burke**

Merrill Lynch  
Florham Park  
john\_j\_burke@ml.com  
(973) 410-2309  
fa.ml.com/the\_harbor\_group  
**\$7m** Typical Account Size  
**\$4,441m** Total Assets

**Christopher Cook**

Merrill Lynch  
Florham Park  
c\_cook@ml.com  
(973) 301-7622  
fa.ml.com/new-jersey/florham-  
park/gcca  
**\$5m** Typical Account Size  
**\$2,051m** Total Assets

**Mark Cortazzo**

MACRO Consulting Group  
Parsippany  
info@macroconsultinggroup.  
com  
(973) 451-9400  
macroconsultinggroup.com

**\$2m** Typical Account Size  
**\$771m** Total Assets

**Mary Deatherage**

Morgan Stanley Private Wealth  
Little Falls  
mary.m.deatherage@  
morganstanleypwm.com  
(973) 890-3015  
morganstanleyfa.com/  
thedeatheragegroup

**\$10m** Typical Account Size  
**\$3,210m** Total Assets

**Mark Fendrick**

UBS Financial Services  
Mount Laurel  
mark.fendrick@ubs.com  
(856) 985-2070  
financialservicesinc.ubs.com/  
team/fendrickgroup  
**\$4m** Typical Account Size  
**\$1,020m** Total Assets

**Reed Finney**

The Bleakley Financial Group  
Fairfield  
Reed.Finney@bleakley.com  
(973) 244-4210  
bleakley.com  
**\$1.3m** Typical Account Size  
**\$585m** Total Assets

**John Hudspeth**

Merrill Lynch Wealth  
Management  
Mount Laurel  
john\_r\_hudspeth@ml.com  
(856) 231-5520  
fa.ml.com/brownehudspeth  
**\$3m** Typical Account Size  
**\$989m** Total Assets

**Elliott Kugel**

Merrill Lynch  
Bridgewater  
Elliott\_M\_Kugel@ML.com  
(908) 685-3252  
fa.ml.com/kugelbriegs  
**\$2.5m** Typical Account Size  
**\$1,616m** Total Assets

**Neil McPeak**

Wells Fargo Advisors  
Linwood  
neil.mcpeak@  
wellsfargoadvisors.com  
(609) 926-7808  
mcpeakgroup.wfadv.com  
**\$1m** Typical Account Size  
**\$1,283m** Total Assets

**Michael J. Ricca**

Morgan Stanley Wealth  
Management  
Florham Park  
Michael.J.Ricca@  
morganstanley.com  
(973) 236-3530  
fa.morganstanley.com/ricca\_  
weinerman  
**\$8m** Typical Account Size  
**\$4,666m** Total Assets

**Steven Rothman**

UBS Financial Services  
Red Bank  
steven.rothman@ubs.com  
(732) 219-7228  
financialservicesinc.ubs.com/  
team/rothmangroup  
**\$1.2m** Typical Account Size  
**\$475m** Total Assets

**Ken Schapiro**

Condor Capital Management  
Martinsville

info@condorcapital.com  
(732) 356-7323  
condorcapital.com

**\$1.75m** Typical Account Size  
**\$1,136m** Total Assets

**Andy Schwartz**

Bleakley Financial Group  
Fairfield

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

**\$2.5m** Typical Account Size  
**\$1,528m** Total Assets

**Anthony Valente**

Morgan Stanley  
Shrewsbury

anthony.valente@morganstanley.com  
(732) 389-5124  
advisor.morganstanley.com/  
anthony.valente

**\$0.75m** Typical Account Size  
**\$1,977m** Total Assets

**David S. Weinerman**

Morgan Stanley Wealth  
Management  
Florham Park

David.S.Weinerman@morganstanley.com  
(973) 236-3529  
fa.morganstanley.com/ricca\_weiernerman

**\$8m** Typical Account Size  
**\$4,673m** Total Assets

**NEW YORK****Lewis Altfest**

Altfest Personal Wealth  
Management  
New York

inquiry@altfest.com  
(212) 406-0850  
altfest.com

**\$2m** Typical Account Size  
**\$1,296m** Total Assets

**Jay Canell**

J.P. Morgan Securities  
New York

Jay.canell@jpmorgan.com  
(212) 272-0888  
jpmorgansecurities.com/  
canellgroup

**\$15m** Typical Account Size  
**\$3,300m** Total Assets

**Neil Canell**

J.P. Morgan Securities  
New York

neil.canell@jpmorgan.com  
(212) 272-0777  
jpmorgansecurities.com/  
canellgroup

**\$15m** Typical Account Size  
**\$3,300m** Total Assets

**Greg DelMonte**

Stifel  
New York

gregory.delmonte@stifel.com  
(212) 328-1645  
delmonte-group.com

**\$1m** Typical Account Size  
**\$1,550m** Total Assets

**Anthony Dertouzos**

Morgan Stanley  
New York

anthony.dertouzos@morganstanleypwm.com  
(212) 761-8565  
pwm.morganstanley.com/  
magellangroup

**\$20m** Typical Account Size  
**\$3,815m** Total Assets

**R. Christopher Errico**

UBS Private Wealth  
Management  
New York

christopher.errico@ubs.com  
(212) 821-7150  
financialservicesinc.ubs.com/team/erricopartners/meetourteam

**\$10m** Typical Account Size  
**\$2,392m** Total Assets

**Marc Fischer**

Graystone Consulting  
Rochester

marc.r.fischer@msgraystone.com  
(585) 389-2271  
morganstanleygc.com/ftc

**\$40m** Typical Account Size  
**\$2,963m** Total Assets

**Jason Katz**

UBS Financial Services  
New York

jason.m.katz@ubs.com  
(212) 713-9201  
ubs.com/team/katz

**\$5m** Typical Account Size  
**\$3,011m** Total Assets

**Gerard Klingman**

Klingman & Associates  
New York

gklingman@klingmanria.com  
(212) 867-7647  
klingmanria.com

**\$10m** Typical Account Size  
**\$2,565m** Total Assets

**Jonathan Kuttin**

Ameriprise Financial Services,  
Inc.  
Hauppauge

jonathan.s.kuttin@ampf.com  
(631) 770-0335  
ameripriseadvisors.com/team/  
kuttin-wealth-management

**\$1m** Typical Account Size  
**\$2.83b** Team Assets

**Joshua Malkin**

Morgan Stanley Private Wealth  
New York

joshua.d.malkin@morganstanleypwm.com  
(212) 893-6530  
pwm.morganstanley.com/  
themalkingroup

**\$10m** Typical Account Size  
**\$1,298m** Total Assets

**Ira Mark**

RBC Wealth Management  
New York

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

**\$10m** Typical Account Size  
**\$3,300m** Total Assets

**Leo Marzen**

Bridgewater Advisors  
New York

lmarzen@bridgewateradv.com  
(212) 221-5300  
bridgewateradv.com/team/leo-marzen

**\$5m** Typical Account Size  
**\$1,525m** Total Assets

**Justin McCarthy**

Mariner Wealth Advisors  
New York

justin.mccarthy@marinerwealthadvisors.com  
(212) 869-5900  
marinerwealthadvisors.com

**\$2.87m** Typical Account Size  
**\$1,169m** Total Assets

**Ed Moldaver**

Stifel  
New York

ed.moldaver@stifel.com  
(212) 328-1677  
moldaverlee.com

**\$10m** Typical Account Size  
**\$6,600m** Total Assets

**Deborah Montaperto**

Morgan Stanley Private Wealth  
New York

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

**\$50m** Typical Account Size  
**\$27,250m** Total Assets

**John Olson**

Merrill Lynch Wealth  
Management  
New York

john\_olson@ml.com  
(212) 303-4010  
fa.ml.com/new-york/new-york/  
theolsongroup

**\$8m** Typical Account Size  
**\$1,848m** Total Assets

**Lyon Polk**

Morgan Stanley Private Wealth  
New York

lyon.polk@morganstanleypwm.com  
(212) 761-0867  
pwm.morganstanley.com/  
polkwealthmanagementgroup

**\$50m** Typical Account Size  
**\$27,250m** Total Assets

**Emily Rubin**

UBS Financial Services  
New York

emily.rubin@ubs.com  
(212) 333-8920  
financialservicesinc.ubs.com/  
team/kramerfinancialgroup

**\$10m** Typical Account Size  
**\$1,300m** Total Assets

**Shawn Rubin**

Morgan Stanley PWM  
New York

shawn.rubin@morganstanleypwm.com  
(212) 893-6322  
pwm.morganstanley.com/  
abacusgroup

**\$10m** Typical Account Size  
**\$3,044m** Total Assets

**Richard Saperstein**

Treasury Partners  
New York

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

**\$25m** Typical Account Size  
**\$16,250m** Total Assets

**Evan Steinberg**

Morgan Stanley  
New York

evan.steinberg@morganstanleypwm.com  
(212) 893-7501  
morganstanleypwa.com/sfgroup

**\$8m** Typical Account Size  
**\$2,335m** Total Assets

**Robert Stolar**

Morgan Stanley Private Wealth  
New York

robert.stolar@morganstanley.com  
(212) 761-8138  
advisor.morganstanley.com/  
family-wealth-group

**\$50m** Typical Account Size  
**\$3,150m** Total Assets

**Michael Taggart**

J.P. Morgan Securities  
New York

michael.taggart@jpmorgan.com  
(212) 272-2044  
jpmorgansecurities.com/  
taggartgroup

**\$10m** Typical Account Size  
**\$850m** Total Assets

**Ron Vinder**

Morgan Stanley Private Wealth  
New York

ron.vinder@morganstanleypwm.com  
(212) 503-2365  
advisor.morganstanley.com/the-vinder-group

**\$50m** Typical Account Size  
**\$7,752m** Total Assets

**Elizabeth Weikes**

J.P. Morgan Securities  
New York

elizabeth.weikes@jpmorgan.com  
(212) 272-9214  
jpmorgansecurities.com/weikes

**\$25m** Typical Account Size  
**\$3,600m** Total Assets

**Richard Zinman**

Morgan Stanley  
New York

richard.zinman@morganstanleypwm.com  
(212) 761-8451  
morganstanleypwa.com/  
magellangroup

**\$20m** Typical Account Size  
**\$3,821m** Total Assets

**NORTH CAROLINA****Mike Absher**

Absher Wealth Management  
Chapel Hill

mike@absherwealth.com  
(919) 283-2340  
absherwealth.com

**\$1.5m** Typical Account Size  
**\$474m** Total Assets

**Mike Bell**

Edward Jones  
Hickory

mike.bell@edwardjones.com  
(828) 328-8111

**\$0.8m** Typical Account Size  
**\$387m** Total Assets

**R. Neil Stikeleather**

Bank of America Merrill Lynch  
Charlotte

neil.stikeleather@ml.com  
(704) 705-3233  
fa.ml.com/  
stikeleatherandassociates

**\$0.75m** Typical Account Size  
**\$461m** Total Assets

**OHIO****Rick Buoncore**

MAI Capital Management, LLC  
Cleveland

rbuoncore@mai.capital  
(216) 920-4800  
mai.capital

**\$10m** Typical Account Size  
**\$4,295m** Total Assets

**Randy Carver**

Raymond James  
Mentor

randy.carver@raymondjames.com  
(440) 974-0808  
carverfinancialservices.com

**\$1m** Typical Account Size  
**\$1,560m** Total Assets

**OHIO, CONT.**

**Charles Dankworth**  
UBS Financial Services  
New Albany  
charles.dankworth@ubs.com  
(614) 939-2202  
ubs.com/team/  
theonecolumbusgroup  
**\$6m** Typical Account Size  
**\$1,116m** Total Assets

**Valerie Newell**  
Mariner Wealth Advisors  
Cincinnati  
valerie.newell@  
marinerwealthadvisors.com  
(513) 618-3040  
marinerwealthadvisors.com  
**\$3m** Typical Account Size  
**\$3,250m** Total Assets

**Thomas Robertson**  
Graystone Consulting  
Columbus  
thomas.g.robertson@  
morganstanley.com  
(614) 460-2754  
graystone.morganstanley.com/  
graystone-consulting-the-  
robertson-group  
**\$2.5m** Typical Account Size  
**\$2,994m** Total Assets

**Daniel Roe**  
Budros, Ruhlin & Roe  
Columbus  
droe@b-r-r.com  
(614) 481-6900  
B-R-R.com  
**\$5m** Typical Account Size  
**\$2,808m** Total Assets

**David Singer**  
The Evelo/Singer/Sullivan  
Group Merrill Private Wealth  
Cincinnati  
david\_singer@ml.com  
(513) 579-3889  
pwa.ml.com/evelosingersullivan  
**\$15m** Typical Account Size  
**\$3,634m** Total Assets

**Linnell Sullivan**  
The Evelo/Singer/Sullivan  
Group Merrill Private Wealth  
Cincinnati  
linnell\_sullivan@ml.com  
(513) 579-3890  
pwa.ml.com/evelosingersullivan  
**\$7.5m** Typical Account Size  
**\$1,490m** Total Assets

**OKLAHOMA**

**Steve Jelley**  
Merrill Lynch Wealth  
Management  
Tulsa  
steve\_jelley@ml.com  
(918) 496-7407  
fa.ml.com/CJU\_Associates  
**\$4.5m** Typical Account Size  
**\$950m** Total Assets

**Jana Shoulders**  
Mariner Wealth Advisors  
Tulsa  
jana.shoulders@  
marinerwealthadvisors.com  
(918) 991-6910  
marinerwealthadvisors.com/  
why-us/people/jana-shoulders  
**\$3.05m** Typical Account Size  
**\$1,981m** Total Assets

**OREGON**

**Judith McGee**  
Raymond James Financial  
Services  
Portland  
judith.mcgee@raymondjames.  
com  
(503) 597-2222  
mcgeewm.com  
**\$1m** Typical Account Size  
**\$648m** Total Assets

**PENNSYLVANIA**

**Patti Brennan**  
Key Financial, Inc.  
West Chester  
pbrennan@keyfinancialinc.com  
(610) 429-9050  
keyfinancialinc.com  
**\$2m** Typical Account Size  
**\$1,061m** Total Assets

**William H. Brown, Jr.**  
Merrill Lynch  
Sewickley  
william.brownjr@ml.com  
(412) 749-7912  
fa.ml.com/  
thebrownhurrayplantzgroup  
**\$4m** Typical Account Size  
**\$1,188m** Total Assets

**Michael Henley**  
Brandywine Oak Private Wealth  
Kennett Square  
mhenley@brandywineoak.com  
(484) 785-0040  
brandywineoak.com  
**\$2.5m** Typical Account Size  
**\$863m** Total Assets

**Michael Hirthler**  
Jacobi Capital Management  
Wilkes-Barre  
mhirthler@jacobicapital.com  
(570) 826-1801  
jacobicapital.com  
**\$3m** Typical Account Size  
**\$1,279m** Total Assets

**Barbara Hudock**  
Hudock Capital Group  
Williamsport  
bhudock@hudockcapital.com  
(570) 326-9500  
hudockcapital.com  
**\$1m** Typical Account Size  
**\$536m** Total Assets

**James Meredith**  
Hefren-Tillotson  
Pittsburgh  
MeredithGroup@hefren.com  
(412) 633-1986  
hefren.com/meredith-group  
**\$2m** Typical Account Size  
**\$1,725m** Total Assets

**J Douglas Moran**  
Merrill Lynch Wealth  
Management  
Wayne  
jdouglas\_moran@ml.com  
(610) 687-7925  
fa.ml.com/JDM  
**\$3.2m** Typical Account Size  
**\$552m** Total Assets

**John J. Parker, Sr.**  
Wells Fargo Advisors  
Philadelphia  
john.j.parker@wffadvisors.com  
(215) 564-8487  
ppwmg.com  
**\$5m** Typical Account Size  
**\$1,650m** Total Assets

**Peter Sargent**  
Janney Montgomery Scott  
Yardley  
psargent@janney.com  
(267) 685-4205  
sargentwealthmanagement.com  
**\$2m** Typical Account Size  
**\$673m** Total Assets

**Craig B. Schwartz**  
Wells Fargo Advisors  
Philadelphia  
craig.schwartz@wffadvisors.com  
(215) 636-1480  
signaturecapital.wffadv.com/  
Craig-Schwartz.e114918.htm  
**\$2.5m** Typical Account Size  
**\$959m** Total Assets

**Thomas Seiler**  
Raymond James  
Newtown  
thomas.seiler@raymondjames.  
com  
(855) 473-4537  
raymondjames.com/  
theseilergroup  
**\$6m** Typical Account Size  
**\$945m** Total Assets

**John Solis-Cohen**  
Wells Fargo Advisors  
Jenkintown  
john.solis-cohen@wffadvisors.  
com  
(215) 572-4276  
home.wellsfargoadvisors.com/  
john.solis-cohen”  
**\$5m** Typical Account Size  
**\$1,435m** Total Assets

**Rob Thomas**  
Mariner Wealth Advisors  
State College  
rob.thomas@  
marinerwealthadvisors.com  
(814) 867-2050  
marinerwealthadvisors.com/  
why-us/people/rob-thomas  
**\$0.18m** Typical Account Size  
**\$1,667m** Total Assets

**RHODE ISLAND**

**Malcolm Makin**  
Raymond James  
Westerly  
mmakin@ppgadvisors.com  
(401) 596-2800  
ppgadvisors.com  
**\$1.5m** Typical Account Size  
**\$1,304m** Total Assets

**David Reiser**  
J.P. Morgan Securities  
Providence  
david.reiser@jpmorgan.com  
(203) 722-9900  
jpmorgansecurities.com/  
reiserwmggroup  
**\$2m** Typical Account Size  
**\$438m** Total Assets

**Matthew Young**  
Richard C. Young & Co., Ltd.  
Newport  
info@younginvestments.com  
(401) 849-2137  
younginvestments.com  
**\$1.71m** Typical Account Size  
**\$1,103m** Total Assets

**SOUTH CAROLINA**

**Ronnie Dennis**  
Merrill Lynch  
Columbia  
ronnie\_dennis@ml.com  
(803) 733-2180  
fa.ml.com/ek  
**\$20m** Typical Account Size  
**\$4,799m** Total Assets

**Richard Migliore**  
Merrill Lynch  
Columbia  
richard\_migliore@ml.com  
(803) 733-2126  
fa.ml.com/ek  
**\$10m** Typical Account Size  
**\$4,799m** Total Assets

**TENNESSEE**

**Jeff Dobyns**  
Southwestern Investment  
Group  
Franklin  
jeff.dobyns@  
swinvestmentgroup.com  
(615) 861-6102  
swinvestmentgroup.com  
**\$3m** Typical Account Size  
**\$467m** Total Assets

**Christi Edwards**  
Morgan Stanley  
Nashville  
christi.edwards@  
morganstanley.com  
(615) 298-6554  
advisor.morganstanley.com/the-  
edwards-pharris-group  
**\$4m** Typical Account Size  
**\$977m** Total Assets

**Malcolm Liles**  
Baird  
Nashville  
mliles@rwbaird.com  
(615) 341-7015  
lilesgroup.com  
**\$4m** Typical Account Size  
**\$1,183m** Total Assets

**Jason Pharris**  
Morgan Stanley  
Nashville  
Jason.Pharris@MorganStanley.  
com  
(615) 298-6555  
fa.morganstanley.com/  
theedwardspharrisgroup  
**\$4m** Typical Account Size  
**\$1,003m** Total Assets

**TEXAS**

**Richard Ashcroft**  
Baird  
Houston  
Rashcroft@rwbaird.com  
(713) 973-3800  
bairdretirementmanagement.  
com/the-ashcroft-pesek-group/  
**\$4m** Typical Account Size  
**\$2,000m** Total Assets

**Bonner Barnes**  
Corda Investment Management  
Houston  
bonner@cordamanagement.com  
(713) 439-0665  
cordamanagement.com  
**\$0.85m** Typical Account Size  
**\$1,163m** Total Assets

**Carl Fuhrmann III**  
Merrill Lynch Wealth  
Management  
San Antonio  
carl\_fuhrmanniii@ml.com  
(210) 805-2981  
fa.ml.com/fuhrmann\_hayne  
**\$3.5m** Typical Account Size  
**\$940m** Total Assets

**Ira Kravitz**  
UBS Financial Services  
Plano  
ira.kravitz@ubs.com  
(469) 440-0547  
financialservicesinc.ubs.com/  
team/kravitzgroup  
**\$5m** Typical Account Size  
**\$827m** Total Assets

**Alexander Ladage**  
UBS Financial Services  
Austin  
alex.ladage@ubs.com  
(512) 479-5287  
financialservicesinc.ubs.com/fa/  
alexladage

**\$10m** Typical Account Size  
**\$1,046m** Total Assets

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**Tommy McBride**

Merrill Lynch  
Dallas  
thomas\_mcbride@ml.com  
(214) 750-2004  
fa.ml.com/mcbride

**\$7.5m** Typical Account Size  
**\$1,593m** Total Assets

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**John Merrill**

Tanglewood Total Wealth  
Management  
Houston  
jmerrill@tanglewoodwealth.  
com  
(713) 840-8880  
tanglewoodwealth.com

**\$2.5m** Typical Account Size  
**\$978m** Total Assets

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**Marie A. Moore**

Morgan Stanley  
Dallas  
marie.a.moore@morganstanley.  
com  
(214) 696-7175  
fa.morganstanley.com/  
themooregroup

**\$2m** Typical Account Size  
**\$492m** Total Assets

---

**Nelson Murray**

Morgan Stanley  
Houston  
nelson.murray@morganstanley.  
com  
(713) 966-2135  
advisor.morganstanley.com/  
nelson.murray

**\$4m** Typical Account Size  
**\$1,700m** Total Assets

---

**Darrell Pennington**

Pennington Wealth  
Management  
Houston  
darrell.r.pennington@ampf.com  
(713) 332-4422  
penningtonwealth.com

**\$1.5m** Typical Account Size  
**\$1,245m** Total Assets

---

**Richard Piatas**

Merrill Lynch Wealth  
Management  
Frisco  
richard.piatas@ml.com  
(940) 297-6990  
fa.ml.com/texas/frisco/  
thepiatasgroup

**\$1m** Typical Account Size  
**\$3,199m** Total Assets

---

**R. Scot Smith**

Morgan Stanley  
Dallas  
scot.smith@morganstanley.com  
(214) 696-7064  
fa.morganstanley.com/scot.  
smith

**\$3m** Typical Account Size  
**\$666m** Total Assets

---

**Scott Tiras**

Tiras Wealth Management  
Houston  
scott.b.tiras@ampf.com  
(713) 332-4400  
tiraswealth.com

**\$4m** Typical Account Size  
**\$2,270m** Total Assets

---

**VIRGINIA**

**Stephan Cassaday**

Cassaday & Company  
McLean  
Steve@cassaday.com  
(703) 506-8200  
cassaday.com

**\$1.5m** Typical Account Size  
**\$3,238m** Total Assets

---

**Tristan Caudron**

Caudron Megary Blackburn  
Wealth Management Group of  
Wells Fargo Advisors  
Alexandria  
tristan.caudron@wfadvisors.  
com  
(703) 739-4545  
CaudronMegaryBlackburn.com

**\$1.8m** Typical Account Size  
**\$1,688m** Total Assets

---

**Simon Hamilton**

Baird  
Reston  
gsmith@rwbaird.com  
(571) 203-1600  
thewiseinvestorgroup.com

**\$1.4m** Typical Account Size  
**\$2,226m** Total Assets

---

**Susan Kim**

Ameriprise Financial  
Vienna  
soo.m.kim@ampf.com  
(703) 226-2300  
ameripriseadvisors.com/  
soo.m.kim

**\$1.5m** Typical Account Size  
**\$1,578m** Total Assets

---

**Jeff LeClair**

Wells Fargo Advisors  
McLean  
jeff.leclair@wellsfargo.com  
(703) 582-6440  
leclairlemlihapproach.com

**\$10m** Typical Account Size  
**\$1,390m** Total Assets

---

**Hanane Lemlih**

Wells Fargo Advisors  
McLean  
hanane.lemlih@wellsfargo.com  
(202) 957-9095  
leclairlemlihapproach.com

**\$10m** Typical Account Size  
**\$1,390m** Total Assets

---

**Aashish Matani**

Merrill Lynch  
Norfolk  
aashish\_matani@ml.com  
(757) 446-4045  
fa.ml.com/virginia/norfolk/  
theahmgroup

**\$4m** Typical Account Size  
**\$1,310m** Total Assets

---

**Joseph Montgomery**

The Optimal Service Group of  
Wells Fargo Advisors  
Williamsburg  
joe.montgomery@  
wellsfargoadvisors.com  
(757) 220-1782  
optimalservicegroup.com

**\$7m** Typical Account Size  
**\$17,044m** Total Assets

---

**Paul Pagnato**

PagnatoKarp  
Reston  
ppagnato@pagnatokarp.com  
(703) 468-2700  
pagnatokarp.com

**\$15m** Typical Account Size  
**\$3,863m** Total Assets

---

**Ryan Sprowls**

Alexandria Wealth Management  
Group of Wells Fargo Advisors  
Alexandria  
ryan.sprows@  
wellsfargoadvisors.com  
(703) 739-1439  
AlexandriaWMG.com

**\$2m** Typical Account Size  
**\$1,388m** Total Assets

---

**WASHINGTON**

**Shari Burns**

United Capital Seattle, a  
Goldman Sachs Company  
Seattle  
paragon@unitedcp.com  
(206) 583-8300  
unitedcp.com/seattle

**\$5.94m** Typical Account Size  
**\$1,819m** Total Assets

---

**Randall Linde**

AGP Wealth Advisors  
Renton  
randall.s.linde@ampf.com  
(425) 228-1000  
agpwealthadvisors.com

**\$0.88m** Typical Account Size  
**\$2,088m** Total Assets

---

**Michael D. Maroni**

Merrill Lynch  
Seattle  
Mike\_maroni@ml.com  
(206) 855-4460  
fa.ml.com/washington/seattle/  
pnpunit

**\$3m** Typical Account Size  
**\$961m** Total Assets

---

**Michael Matthews**

UBS Private Wealth  
Management  
Bellevue  
m.matthews@ubs.com  
(425) 451-2350  
ubs.com/team/  
thematthewsgroup

**\$5m** Typical Account Size  
**\$1,559m** Total Assets

---

**Erin Scannell**

Ameriprise Financial  
Mercer Island  
erin.j.scannell@ampf.com  
(425) 709-2345  
heritage-wealth.com

**\$2m** Typical Account Size  
**\$2,870m** Total Assets

---

**WEST VIRGINIA**

**Christopher Hall**

Hall Financial Advisors  
Parkersburg  
chrishall@wfafinet.com  
(304) 865-4442  
hallfinancialadvisorsllc.com

**\$0.7m** Typical Account Size  
**\$854m** Total Assets

---

**WISCONSIN**

**Andrew Burish**

UBS Financial Services  
Madison  
andrew.burish@ubs.com  
(608) 831-4282  
ubs.com/team/burishgroup

**\$2m** Typical Account Size  
**\$3,591m** Total Assets

---

**Michael Smith**

Michael Smith & Associates  
Stevens Point  
michael.e.smith@ampf.com  
(715) 341-6657  
ameripriseadvisors.com/team/  
michael-smith-associates

**\$0.85m** Typical Account Size  
**\$543m** Total Assets

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Participation in this section is only open to advisors who have been listed in our editorial rankings. Advisors pay a fee to be included 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 info, visit [barrons.com/directory](http://barrons.com/directory).



# BARRON'S TOP RIA FIRMS

Below is a reprint of select firms from Barron's Top 100 RIA firms ranking who are actively taking on new clients. For more information on them and other ranked advisors, visit [barrons.com/directory](http://barrons.com/directory).

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#### 1919 Investment Counsel

New York, NY  
[info@1919ic.com](mailto:info@1919ic.com)  
 (212) 554-7135  
 1919ic.com  
 25 Advisors | 8 Offices  
**\$13.2b** Total Assets  
**\$2m** Account Minimum

---

#### Allworth Financial

Sacramento, CA  
[info@allworthpartners.com](mailto:info@allworthpartners.com)  
 (888) 242-6766  
 AllworthPartners.com  
 83 Advisors | 17 Offices  
**\$8b** Total Assets

---

#### Athena Capital Advisors

Lincoln, MA  
[contactathena@athenacapital.com](mailto:contactathena@athenacapital.com)  
 (781) 274-9300  
 athenacapital.com  
 16 Advisors | 2 Offices  
**\$5.8b** Total Assets  
**\$25m** Account Minimum

---

#### Balasa Dinverno Foltz LLC

Chicago, IL  
[info@bdflc.com](mailto:info@bdflc.com)  
 (800) 840-4740  
 bdflc.com  
 43 Advisors | 3 Offices  
**\$4.5b** Total Assets  
**\$1m** Account Minimum

---

#### Carson Wealth

Omaha, NE  
[rcarson@carsongroup.com](mailto:rcarson@carsongroup.com)  
 (888) 321-0808  
 carsonwealth.com  
 159 Advisors | 120 Offices  
**\$11.8b** Total Assets  
**\$100k** Account Minimum

---

#### Chevy Chase Trust

Bethesda, MD  
[info@chevychasetrust.com](mailto:info@chevychasetrust.com)  
 (240) 497-5008  
 chevychasetrust.com  
 15 Advisors | 1 Office  
**\$32b** Total Assets  
**\$3m** Account Minimum

---

#### Churchill Management

Los Angeles, CA  
[info@churchillmanagement.com](mailto:info@churchillmanagement.com)  
 (877) 937-7110  
 churchillmanagement.com  
 42 Advisors | 41 Offices  
**\$5.5b** Total Assets  
**\$750k** Account Minimum

---

#### Douglas C. Lane & Associates

New York, NY  
[update@dclainc.com](mailto:update@dclainc.com)  
 (212) 262-7670  
 dclainc.com  
 10 Advisors | 1 Office  
**\$5.4b** Total Assets  
**\$1m** Account Minimum

---

#### Edelman Financial Engines

Santa Clara, CA  
[info@EdelmanFinancialEngines.com](mailto:info@EdelmanFinancialEngines.com)  
 (888) PLAN-RIC  
 edelmanfinancialengines.com  
 320 Advisors | 168 Offices  
**\$192b** Total Assets  
**\$5** Account Minimum

---

#### EP Wealth Advisors

Torrance, CA  
[rserrecchia@epwealth.com](mailto:rserrecchia@epwealth.com)  
 (310) 543-4559  
 epwealth.com  
 52 Advisors | 14 Offices  
**\$6.2b** Total Assets  
**\$500k** Account Minimum

---

#### Kovitz

Chicago, IL  
[wealth@kovitz.com](mailto:wealth@kovitz.com)  
 (312) 334-7300  
 kovitz.com  
 35 Advisors | 4 Offices  
**\$4.6b** Total Assets  
**\$1m** Account Minimum

---

#### MAI Capital Management, LLC

Cleveland, OH  
[info@mai.capital](mailto:info@mai.capital)  
 (216) 920-4800  
 mai.capital  
 49 Advisors | 8 Offices  
**\$6.2b** Total Assets  
**\$1m** Account Minimum

---

#### Mariner Wealth Advisors

Leawood, KS  
[startyourjourney@marinerwealthadvisors.com](mailto:startyourjourney@marinerwealthadvisors.com)  
 (913) 647-9700  
[marinerwealthadvisors.com](mailto:marinerwealthadvisors.com)  
 299 Advisors | 35 Offices  
**\$18.7b** Total Assets  
**\$100k** Account Minimum

---

#### Private Advisor Group

Morristown, NJ  
[startthediologue@privateadvisorgroup.com](mailto:startthediologue@privateadvisorgroup.com)  
 (973) 538-7010  
[privateadvisorgroup.com](mailto:privateadvisorgroup.com)  
 650 Advisors | 286 Offices  
**\$21.2b** Total Assets  
**\$100k** Account Minimum

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#### RG'T Wealth Advisors

Dallas, TX  
[info@rgtadvisors.com](mailto:info@rgtadvisors.com)  
 (214) 360-7000  
 rgtadvisors.com  
 33 Advisors | 1 Office  
**\$3.9b** Total Assets  
**\$3m** Account Minimum

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#### Sequoia Financial Group

Akron, OH  
[info@sequoia-financial.com](mailto:info@sequoia-financial.com)  
 (888) 225-3777  
 sequoia-financial.com  
 40 Advisors | 6 Offices  
**\$4.7b** Total Assets  
**\$0** Account Minimum

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#### Sullivan, Bruyette, Speros & Blaney

McLean, VA  
[info@sbsbllc.com](mailto:info@sbsbllc.com)  
 (703) 734-9300  
 sbsbllc.com  
 28 Advisors | 2 Offices  
**\$4.3b** Total Assets  
**\$3m** Account Minimum

---

#### Wetherby Asset Management

San Francisco, CA  
[info@wetherby.com](mailto:info@wetherby.com)  
 (415) 399-9159  
 wetherby.com  
 24 Advisors | 3 Offices  
**\$5.4b** Total Assets  
**\$10m** Account Minimum