

DAVID EINHORN ON ALLIED, LEHMAN BROTHERS AND THE CASE FOR SHORT-SELLING
PHILANTHROCAPITALISM: CAN THE RICH SAVE THE WORLD?

Worth

WEALTH IN PERSPECTIVE

The Top

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Wealth Advisors

Smart Advice for a Challenging Economy

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	FIRM, CITY	PHONE	FIRM ASSETS	LARGEST CLIENT'S NET WORTH	MEDIAN CLIENT NET WORTH	MINIMUM ASSETS FOR NEW CLIENT	
Alabama							
	Norman Berk, JD, CPA, CFP, PFS	Professional Asset Strategies, Birmingham	205.298.1234	\$128 million	\$40 million	\$1.3 million	\$0.1 million
	Patrick Chitwood, CPA, PFS, ChFC	Chitwood Advisory Group, Birmingham	205.980.8113	\$105 million	\$12 million	\$3 million	\$0.5 million
	Robert McLaughlin, CFP, CMFS	Investors Capital Corporation, Birmingham	205.408.9799	\$1 billion	\$50 million	\$5 million	\$1 million
Arizona							
	Laurie Bagley, CFA	Strategic Wealth Advisors, Scottsdale	480.998.1798	\$155 million	\$100 million	\$5 million	\$2 million
	Thomas J. Connelly, CFP	Versant Capital Management, Phoenix	602.635.3760	\$242 million	\$80 million	\$6.4 million	\$2 million
	Jacob Gold, CFP, CWM	Jacob Gold & Associates, Scottsdale	480.998.4653	\$180 million	\$20 million	\$6.4 million	\$0.5 million
	Philip Stoker, CFP	Stoker Ostler Wealth Advisors, Scottsdale	480.890.8088	\$725 million	\$50 million	\$3.3 million	\$0.5 million
Arkansas							
	Fredrick E. Adkins III, CFP, ChFC, CLU	The Arkansas Financial Group, Little Rock	501.376.9051	\$206 million	\$17 million	\$1.2 million	N/A
	Cynthia L. Conger, CPA, CFP, PFS	Cynthia L. Conger, Little Rock	501.374.1174	\$44 million	\$24 million	\$1.1 million	\$0.5 million
	Patrick Ifrah, MBA	Ifrah Financial Services, Little Rock	501.821.7733	\$287 million	\$100 million	\$1.5 million	N/A
California							
	Ramin Alizadeh, PhD	Merrill Lynch, San Francisco	415.288.3200	\$1.6 trillion	\$2 billion	\$250 million	\$10 million
	Peter Arbogast, CFP	Merrill Lynch, San Francisco	415.288.2558	\$1.6 trillion	\$2 billion	\$60 million	\$10 million
	Dina Artzt	UBS Financial Services, Palo Alto	650.496.7494	\$2.8 trillion	\$120 million	\$6 million	\$0.3 million
	Rich Arzaga	AIG Advisor Group, San Ramon	925.824.2880	\$100 million	\$20 million	\$10 million	\$0.5 million
	Guy Baker, CFP, CLU, ChFC	Baker Jensen Investment Advisors, Irvine	949.900.0099	\$250 million	\$100 million	\$5 million	\$0.25 million
	Andrew Basch, CFP	Citi Family Office, Los Angeles	310.443.0538	\$1.7 trillion	\$1 billion	\$10 million	N/A
	Jim Berliner, JD	Westmount Asset Management, Los Angeles	310.556.2502	\$1.25 billion	\$275 million	\$7 million	\$1 million
	Craig Bloom, MBA, CIMA	Smith Barney, Los Angeles	310.551.9454	\$1.7 trillion	\$200 million	\$5 million	\$1 million
	James M. Boon	Morgan Stanley, Rancho Santa Fe	858.613.7100	\$779 billion	\$250 million	\$5 million	\$3 million
	Norman Boone, CFP	Mosaic Financial Partners, San Francisco	415.788.1952	\$400 million	\$25 million	\$4 million	\$2 million
	Carl Camp, CFP	Eclectic Associates, Fullerton	714.738.0220	\$360 million	\$17 million	\$1.5 million	\$0.4 million
	Vince DiLeva, CFP, MS	Signature Estate & Investment Advisors, Los Angeles	310.712.2323	\$1.4 billion	\$24 million	\$3.5 million	\$0.5 million
	Leland Faust	CSI Capital Management, San Francisco	415.354.3000	\$1.2 billion	\$100 million	\$7 million	\$2 million
	Derek Fowler, CFP	Citi Family Office, Menlo Park	650.234.5146	\$1.7 trillion	\$500 million	\$30 million	\$3 million
	Michael Glowacki, CPA, MS, CFP	The Glowacki Group, Los Angeles	310.473.0100	\$284 million	\$153 million	\$8 million	\$5 million
	Stacy Grant, CPA, MS, CFP	Merrill Lynch, San Francisco	415.288.2524	\$1.6 trillion	\$250 billion	\$50 million	\$10 million
	Meloni Hallock, MBA, CPA, PFS, CIMA	Acacia Wealth Advisors, Beverly Hills	310.246.0570	\$700 million	\$1 billion	\$42 million	\$10 million
	Neil Hokanson, CFP	Hokanson Associates, Solana Beach	858.755.8899	\$335 million	\$96 million	\$3.4 million	N/A
	Richard Holbrook, CFA	Holbrook Global Strategies, Palo Alto	650.346.2630	\$112 million	\$30 million	\$3.5 million	\$1 million
	Brian Holmes, CFP, MS	Signature Estate & Investment Advisors, Los Angeles	310.712.2323	\$1.4 billion	\$60 million	\$6 million	\$0.5 million
	Michael Johnston, MBA	Merrill Lynch, Newport Beach	949.955.5701	\$1.6 trillion	\$20 billion	\$24 million	\$5 million
	Debbie Jorgensen	Merrill Lynch, San Francisco	415.955.3782	\$1.6 trillion	\$140 million	\$21 million	\$5 million
	Brent Kessel, CFP	Abacus Wealth Partners, Pacific Palisades	310.566.1890	\$800 million	\$390 million	\$20 million	\$3 million
	S. Timothy Kochis, JD, MBA, CFP	Aspiriant, San Francisco	415.371.7800	\$5.1 billion	\$430 million	\$22 million	\$5 million
	Jason Labrum, CFP	Smith Barney, Carlsbad	760.602.3571	\$1.7 trillion	\$100 million	\$3.5 million	\$0.25 million
	Michael Ladge, MBA	Smith Barney, Los Angeles	310.551.9457	\$1.7 trillion	\$2 billion	\$7.5 million	\$1 million
	Walter Lim, CIMA	Smith Barney, San Francisco	415.984.6979	\$1.7 trillion	\$200 million	\$3 million	\$0.5 million
	Barry Masci, CFP, CFA, CMT, CMFC	Morgan Stanley, San Diego	800.473.1331	\$779 billion	\$8 million	\$1 million	\$0.15 million
	James McCabe, JD	Wells Fargo Investments, Beverly Hills	310.285.5848	\$256 billion	\$1 billion	\$10 million	\$1 million
	Bruce Micheel, CFP	Smith Barney, Santa Barbara	805.963.3381	\$1.7 trillion	\$70 million	\$4 million	\$1 million
	Richard P. Moran, CFP	Moran, Kimura & Heising (FNIC), Rolling Hills Estates	310.406.3080	\$55 billion	\$60 million	\$6.7 million	\$1 million
	David Moyne, MBA, CFM	Merrill Lynch, San Francisco	415.288.2609	\$1.6 trillion	\$1.75 billion	\$150 million	\$10 million

	FIRM, CITY	PHONE	FIRM ASSETS	LARGEST CLIENT'S NET WORTH	MEDIAN CLIENT NET WORTH	MINIMUM ASSETS FOR NEW CLIENT
Jason Romano, CFP	Moss Adams Wealth Advisors, Los Angeles	310.481.1370	\$850 million	\$750 million	\$10 million	\$1 million
Rebecca Rothstein	Citi Family Office, Beverly Hills	877.860.3311	\$1.7 trillion	\$325 million	\$20 million	\$1 million
Harvey Rowen	Starmont Asset Management, San Ramon	925.648.4738	\$100 million	\$10 million	\$6 million	\$1 million
Todd Rustman, CFP, CFA, CLU	GR Capital Asset Management, Newport Beach	800.805.7526	\$8.9 billion	\$250 million	\$10 million	\$1 million
Michael Schneickert, MBA, CPA	Citi Family Office, Los Angeles	213.486.7172	\$1.7 trillion	\$2.8 billion	\$50 million	\$10 million
Alex Shahidi, JD, CFP, CFA, CLU, CIMA, ChFC	Merrill Lynch, Los Angeles	310.407.3943	\$1.6 trillion	\$5.5 billion	\$45 million	\$20 million
Spencer D. Sherman, MBA, CFP	Abacus Wealth Partners, Sebastopol	707.829.6190	\$800 million	\$143 million	\$8.1 million	\$10 million
Richard Stone, CFP, CLU	Salient Wealth Management, San Rafael	415.526.2900	\$456 million	\$121 million	\$2.5 million	\$2 million
Nicholas Stonnington	Stonnington Group, Los Angeles	213.683.4511	\$250 million	\$1 billion	\$8 million	\$1 million
Seth Streeter, MS, CFP, CDFA	Mission Wealth Management, Santa Barbara	805.882.2360	\$525 million	\$100 million	\$5 million	\$1 million
Laura Tarbox, CFP	The Tarbox Group, Newport Beach	949.721.2330	\$354 million	\$103 million	\$62 million	\$2 million
Carolyn P. Taylor	Weatherly Asset Management, Del Mar	858.259.4507	\$254 million	\$100 million	\$4.5 million	\$0.5 million
Stephanie Twomey, MBA, CIMA	Citi Family Office, Menlo Park	650.234.5122	\$1.7 trillion	\$300 million	\$25 million	\$2.5 million
Debra Wetherby, CPA, CFP, CFA	Wetherby Asset Management, San Francisco	415.399.9159	\$3 billion	\$250 million	\$27 million	\$10 million
Christopher Wheaton, CPA, CFP	Litman/Gregory Asset Management, Larkspur	415.461.8999	\$6.4 billion	\$1.6 billion	\$5.5 million	\$3 million

Colorado

Mark R. Brown, CFP	Brown & Tedstrom (LPL Financial), Denver	303.863.7231	\$279 billion	\$60 million	\$8 million	\$2 million
Joseph Janiczek	Janiczek & Company, Greenwood Village	303.721.7000	\$358 million	\$140 million	\$12 million	\$3 million
Walter Obermeyer, MBA	Obermeyer Asset Management Company, Aspen	970.925.8747	\$720 million	\$2 billion	\$5 million	\$1 million
L. Scott Pann, MBA, CIMA	Citi Family Office, Colorado Springs	719.577.6322	\$1.7 trillion	\$400 million	\$1.5 million	\$1 million
Myra Salzer, CFP	Wealth Conservancy, Boulder	303.444.1919	\$1.3 billion	\$400 million	\$28 million	\$5 million
Todd Schwartz, CFP, CAIA	Smith Barney, Englewood	303.925.9662	\$1.7 trillion	\$50 million	\$4 million	\$1 million
Eileen Sharkey	Sharkey, Howes & Javer, Denver	800.557.9380	\$465 million	\$10 million	\$1 million	\$0.25 million
Judith A. Shine, CFP	Shine Investment Advisory Services, Lone Tree	303.740.8600	\$457 million	\$64 million	\$7.2 million	\$1 million
Mark Smith, CFP	M.J. Smith & Associates, Englewood	303.768.0007	\$565 million	\$40 million	\$1.5 million	\$1 million
Peter F. Tedstrom, CFP	Brown & Tedstrom (LPL Financial), Denver	303.863.7231	\$279 billion	\$45 million	\$6 million	\$1 million
Benjamin Valore-Caplan, CIMA	Syntrinsic Investment Counsel, Denver	877.296.7100	\$750 million	\$55 million	\$30 million	N/A

Connecticut

John F. (Jeff) Erdmann III, CFM	Merrill Lynch, Greenwich	203.861.5902	\$1.6 trillion	\$1 billion	\$50 million	\$10 million
LeGrand S. Redfield Jr., ChFC, CLU	Asset Management Group, Stamford	203.964.8300	\$160 million	\$24 million	\$3.5 million	N/A
Harold J. Trischman, MBA	Citi Family Office, Greenwich	203.661.3330	\$1.7 trillion	\$200 billion	\$7 million	\$2.5 million
Alan Weiss, CPA, CFP	Regent Wealth Management Group, Woodbridge	800.443.3101	\$305 million	\$52 million	\$6.4 million	\$2 million

Delaware

Ravi Dattani, CPA, CFP	Schiavi + Dattani, Wilmington	302.994.4444	\$225 million	\$12 million	\$3 million	\$1 million
Paul Emata, CFA, CFP	PNC Wealth Management, Wilmington	302.429.1521	\$73 billion	\$150 million	\$75 million	\$20 million
Judith W. Lau	Lau Associates, Wilmington	302.792.5955	\$600 million	\$225 million	\$43 million	\$3 million
Donald W. Nicholson	Donald W. Nicholson & Associates, Wilmington	302.529.1500	\$79 million	\$8 million	\$1.5 million	N/A
Murray Sawyer, JD	Westover Capital Advisors, Wilmington	302.427.9600	\$120 million	\$40 million	\$5 million	\$1 million

Florida

Jeffrey Camarda, PhD, CFP, CFA, ChFC, CLU	Camarda Financial Advisors, Orange Park	904.278.1177	\$188 million	\$5.6 million	\$1.4 million	\$0.1 million
Louis J. Chiavacci, MBA	Merrill Lynch, Coral Gables	305.774.0500	\$1.6 trillion	\$300 million	\$70 million	\$10 million
Michael H. Davis, JD, CPA, CFP	Resource Consulting Group, Orlando	407.422.0252	\$1.1 billion	\$60 million	\$17 million	\$1 million
Mark Elliott MS, CFP	Wachovia Sec. Invest. Svcs. Grp., Palm Beach Garden	561.207.2530	\$1.1 trillion	\$40 million	\$3 million	\$0.25 million
Harold Evensky	Evensky & Katz, Coral Gables	305.448.8882	\$600 million	\$100 million	\$10 million	\$1 million
Steven Foldes, JD, CFP, MCFC	Foldes Financial Management, Miami	305.670.0545	\$425 million	\$35 million	\$2.5 million	\$1 million
Brent Fykes, CFP, CFA, CLU, CWPP	GenSpring Family Offices, Jupiter	561.354.2550	\$15 billion	\$425 million	\$60 million	\$25 million

	FIRM, CITY	PHONE	FIRM ASSETS	LARGEST CLIENT'S NET WORTH	MEDIAN CLIENT NET WORTH	MINIMUM ASSETS FOR NEW CLIENT
Lawrence A. Greenberg	Citi Private Bank, Palm Beach	561.650.0276	\$1.7 trillion	\$250 million	\$20 million	\$5 million
Robert Isbitts, CFS	Emerald Asset Advisors, Weston	954.385.9624	\$289 million	\$75 million	\$7 million	\$2 million
Brant Keller, CFP, CES	FAC Wealth Management, Naples	239.596.0118	\$180 million	\$25 million	\$5 million	\$0.25 million
Matt Kutcher, CFP	Citi Private Bank, Palm Beach	561.653.3132	\$1.7 trillion	\$1 billion	\$25 million	\$5 million
Robert Levitt, CFA	Levitt Capital Management, Boca Raton	561.893.9901	\$482 million	\$300 million	\$7.5 million	\$3 million
R. Thomas Mayes Jr., CFP	Calibre (Wachovia Wealth Management), Palm Beach	561.820.1141	\$259 billion	\$1.4 billion	\$300 million	\$50 million
Gordon Nearing, MBA, CFP, CIMA	Wachovia Securities Private Client Group, Stuart	772.692.5817	\$1.1 trillion	\$60 million	\$2 million	\$1 million
William Neubauer, MBA, CFP	Comprehensive Money Mgmt. Services, Coral Gables	305.662.7757	\$40 million	\$15 million	\$2 million	N/A
Cathy Pareto, MBA, CFP	Cathy Pareto & Associates, Coral Gables	305.728.7234	\$10 million	\$7 million	\$1.5 million	\$0.15 million
Thomas Ruggie, CFP, CLU, ChFC	Ruggie Wealth Management, Tavares	352.343.2700	\$322 million	\$110 million	\$1.5 million	\$1 million
Michael Shapiro, JD, MS	Smith Barney, Boca Raton	561.393.2042	\$1.7 trillion	\$95 million	\$3 million	\$0.5 million
Marc Singer, MBA, CFP	Singer Xenos Wealth Management, Coral Gables	305.443.0060	\$1 billion	\$150 million	\$6.1 million	\$1 million
Benjamin Tobias, CPA, CFP, PFS	Tobias Financial Advisors, Plantation	954.424.1660	\$143 million	\$17 million	\$2 million	\$0.6 million

Georgia

Bruce F. Bickley, CPA	UBS Financial Services, Atlanta	877.794.1042	\$2.8 trillion	\$650 million	\$15 million	\$5 million
Franklin H. Butterfield, CPA, CFP, CFA, PFS	Homrich & Berg, Atlanta	404.264.1400	\$1.95 billion	\$300 million	\$5 million	\$3 million
Scott Dozier, CPA, CIMA	Citi Family Office, Atlanta	404.266.6554	\$1.7 trillion	\$350 million	\$20 million	\$5 million
Mary Ellen Garrett	Merrill Lynch, Atlanta	404.231.2506	\$1.6 trillion	\$100 million	\$6 million	\$2 million
Sammy Grant, JD, CPA, CFP, CLU	SG Financial Advisors, Atlanta	404.459.0025	\$127 million	\$75 million	\$2 million	\$0.5 million
Anthony Guinta, CPA, CFP, PFS	Homrich & Berg, Atlanta	404.264.1400	\$1.95 billion	\$1 billion	\$7 million	\$3 million
Chris Hohlstein, MBA, CFA	Synovus Family Asset Management, Columbus	706.644.0421	\$4.8 billion	\$500 million	\$50 million	N/A
Ronald Hughes Jr., MBA, CFM	Merrill Lynch, Atlanta	404.231.2558	\$1.6 trillion	\$285 million	\$23 million	\$15 million
Buck Wiley III, JD, MBA, CIMA	Merrill Lynch, Atlanta	404.264.2920	\$1.6 trillion	\$41 million	\$10 million	\$5 million

Hawaii

Les Andrews, MS, CFP, ChFC, CLU	Andrews Advisory Associates, Honolulu	808.521.4015	\$110 million	\$10 million	\$2 million	\$0.25 million
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Illinois

Richard Black, JD, CFP	Altair Advisers, Chicago	312.429.3003	\$2.8 billion	\$1.5 billion	\$12 million	\$3 million
Brent Brodeski, MBA, CPA, CFP, CFA	Savant Capital Management, Rockford	815.227.0300	\$1.6 billion	\$118 million	\$2.4 million	\$1 million
Michael Kabarec, CPA, CFP, PFS	Kabarec Financial Advisors, Palatine	847.934.7777	\$153 million	\$35 million	\$4.6 million	\$0.5 million
Lynn Lavender, CFP	JPMorgan, Chicago	312.732.6070	\$1.6 trillion	\$100 million	\$40 million	\$1 million
Robert Meeks, JD	JMG Financial Group, Oak Brook	630.571.5252	\$1.1 billion	\$47 million	\$6.6 million	\$1 million
David Murdock, CFP, CLU, CIMA	Northern Trust, Chicago	312.557.3311	\$778.6 billion	\$500 million	\$64 million	\$25 million
Sue Stevens, MBA, CPA, MS, CFP, CFA	Stevens Portfolio Design, Deerfield	847.444.0209	\$132 million	\$41 million	\$3.6 million	\$3.5 million
Lynn Varndell	JPMorgan, Chicago	312.732.7084	\$1.6 trillion	\$100 million	\$20 million	\$1 million
Steven Weinstein, JD, MBA, CFP, CFA	Altair Advisers, Chicago	312.429.3013	\$2.8 billion	\$1 billion	\$15 million	\$5 million
Robert A. Westrick, MBA, CPA, CFP	WNA Investment Programs, Hinsdale	630.455.0600	\$160 million	\$45 million	\$2.3 million	\$0.5 million
David Wright, MBA, CFP	Merrill Lynch, Chicago	312.325.2620	\$1.6 trillion	\$5 billion	\$35 million	\$10 million

Indiana

Paul Coan, CFP, ChFC, CEA	Wealth Planning & Management, Indianapolis	317.577.4426	\$75 million	\$17 million	\$5 million	\$0.5 million
Robin A. Hall, JD, CFP	Premier Wealth Advisors, Indianapolis	317.663.3939	\$125 million	\$59 million	\$8.8 million	\$1.5 million

Iowa

Phil Kruzan, CFP	Foster Group, West Des Moines	515.226.9000	\$955 million	\$75 million	\$4.5 million	\$0.85 million
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Kansas

Stewart S. Koesten, MS, CFP, CLU, ChFC	Wealth Management Services, Overland Park	913.345.1881	\$220 million	\$20 million	\$4 million	\$0.5 million
Peter Mallouk, JD, MBA, CFP	Creative Planning Private Wealth Mgmt., Leawood	913.338.2727	\$705 million	\$220 million	\$8.8 million	N/A

	FIRM, CITY	PHONE	FIRM ASSETS	LARGEST CLIENT'S NET WORTH	MEDIAN CLIENT NET WORTH	MINIMUM ASSETS FOR NEW CLIENT
Kentucky						
Dean Donohue, CFP	Ameriprise Financial, Louisville	502.412.4050	\$480 billion	\$8 million	\$2.5 million	\$0.1 million
Louisiana						
Kevin F. Knobloch	JPMorgan, Baton Rouge	225.332.3130	\$1.6 trillion	\$120 million	\$8 million	\$2 million
Michael Zabalou, CPA, MS, CFP, PFS	Resource Management, Metairie	504.833.5378	\$640 million	\$25 million	\$9 million	\$1 million
Maryland						
Saxon Birdsong, MBA	Baltimore-Washington Financial Advisors, Columbia	888.461.3900	\$200 million	\$10 million	\$1.5 million	\$0.5 million
Gregory Hurlbrink, CFP	Citi Family Office, Baltimore	410.736.5316	\$1.7 trillion	\$500 million	\$3 million	\$1 million
Robert I. Jeffrey	Smith Barney, Baltimore	410.736.5332	\$1.7 trillion	\$40 million	\$5 million	\$1 million
Howard Weiss, MBA, CFP	U.S. Trust, BofA Private Wealth Mgmt., Baltimore	410.547.4771	\$225 billion	\$930 million	\$175 million	\$25 million
Massachusetts						
Glenn Frank, MBA, CPA, MS, CFP, PFS, MST	Wachovia Wealth Management, Waltham	781.392.2821	\$259 billion	\$68 million	\$7.8 million	\$4 million
Cary Geller, CPA, CFP, PFS	Mintz Levin Financial Advisors, Boston	617.348.1823	\$1.2 billion	\$50 million	\$6 million	\$1 million
Lawrence Glazer	Mayflower Advisors, Boston	617.259.1767	\$225 million	\$30 million	\$2.5 million	\$0.25 million
Andrew Kyriacou, JD, LLM, CIMA	WTAS, Boston	617.292.8402	\$1.2 billion	\$550 million	\$10 million	\$2 million
Paul McCauley	Merrill Lynch, Boston	617.946.8051	\$1.6 trillion	\$250 million	\$30 million	\$10 million
Michael Nathanson, JD, LLM	The Colony Group, Boston	617.723.8200	\$1.2 billion	\$130 million	\$8 million	\$5 million
Kristine Porcaro	Lexington Wealth Management, Lexington	781.860.7745	\$247 million	\$5 million	\$3.5 million	\$2 million
Brian Strachan	Citi Family Office, Boston	617.570.9240	\$1.7 trillion	\$200 million	\$40 million	\$5 million
Pran Tiku, CFP, CFA, ChFC	Peak Financial Management, Waltham	781.487.9500	\$301 million	\$165 million	\$2.1 million	\$1 million
Michael Tucci, MBA, CPA, CIMA	Lexington Wealth Management, Lexington	781.860.7745	\$250 million	\$35 million	\$8 million	\$2 million
Michigan						
Marilyn Capelli Dimitroff, CFP	Capelli Financial Services, Bloomfield Hills	248.594.9282	\$300 million	\$60 million	\$4.1 million	\$1 million
John E. Mullins, CPA, CFP, PFS	Greystone Financial Group, Troy	248.267.1270	\$326 million	\$30 million	\$1.5 million	\$1 million
Robert Palmer, CPA, CFP	Plante Moran Financial Advisors, Southfield	248.223.3315	\$5.4 billion	\$250 million	\$9 million	\$0.75 million
Sherri Stephens	Stephens Wealth Management Group, Flint	810.732.7411	\$214 billion	\$17 million	\$1.6 million	\$0.5 million
Bert Whitehead, JD, MBA	Cambridge Connection, Franklin	248.737.7090	\$350 million	\$40 million	\$4 million	\$1 million
Charles Zhang, MBA, CFP, CLU, ChFC	Zhang Financial, Portage	269.385.5888	\$800 million	\$100 million	\$3 million	\$1 million
Minnesota						
Kathleen Longo	Accredited Investors, Edina	952.841.2222	\$740 million	\$25 million	\$4 million	\$1.5 million
Sharon Olson	Olson Weiss, Bloomington	952.835.1797	\$220 million	\$160 million	\$3.7 million	\$0.5 million
Jose Peris, PhD	U.S. Bank, Minneapolis	612.303.3141	\$60 billion	\$500 million	\$25 million	\$1 million
Jerry Wade, CFP, CFS	Wade Financial Group, Minneapolis	763.797.9577	\$260 million	\$75 million	\$5.7 million	\$0.5 million
Mississippi						
Dudley M. Barnes, CFP	Barnes-Petty Financial Advisors, Clarksdale	662.627.2225	\$120.5 billion	\$40 million	\$2.5 million	\$0.4 million
Missouri						
Barbara Archer, MBA, CFP, CLU	Archer Wealth Management (NFPSP), St. Louis	314.726.2208	\$8.5 billion	\$25 million	\$3 million	\$1 million
James Blair, CFP	Moneta Group, Clayton	314.726.2300	\$8 billion	\$85 million	\$6.5 million	\$5 million
Richard Hill, MBA, CFP	Hill Investment Group, Clayton	866.834.0561	\$124 million	\$22 million	\$4 million	\$1 million
Joan Malloy, CPA, CFP, CFA, PFS	St. Louis Trust, St. Louis	314.727.4600	\$2.65 billion	\$600 million	\$75 million	\$10 million
Montana						
James B. Stack	Stack Financial Management, Whitefish	406.862.8000	\$360 million	\$50 million	\$10 million	\$0.35 million

	FIRM, CITY	PHONE	FIRM ASSETS	LARGEST CLIENT'S NET WORTH	MEDIAN CLIENT NET WORTH	MINIMUM ASSETS FOR NEW CLIENT
W. Taylor Campbell III, CPA, CFP	D.L. Davis & Company, Winston-Salem	336.761.8440	\$2.1 billion	\$150 million	\$2 million	\$0.25 million
Larry Carroll, CFP, CMFC	Carroll Financial Associates, Charlotte	704.553.8006	\$1.5 billion	\$60 million	\$2.4 million	\$0.5 million
Ohio						
Michael J. Chasnoff	Truepoint Capital, Cincinnati	513.792.6648	\$767 million	\$125 million	\$13 million	\$2 million
Mark Ciulla, CPA, CFA	Capital Advisors, Shaker Heights	216.295.7900	\$516 million	\$120 million	\$15 million	\$1 million
Anthony Decello, JD, CFP	Deloitte Investment Advisors, Cleveland	216.589.5482	\$9 billion	\$250 million	\$10 million	\$5 million
Carina Diamond, MBA, CFP	SS&G Wealth Management, Akron	330.598.2208	\$17 billion	\$10 million	\$2.5 million	\$0.25 million
Joseph Evelo	Merrill Lynch, Cincinnati	513.579.3888	\$1.6 trillion	\$500 million	\$25 million	\$10 million
Daniel Gaugler, CPA, CFP, PFS	Fairway Wealth Management, Cleveland	216.573.7200	\$600 million	\$120 million	\$15 million	\$5 million
William Heichel, JD, CFP	Pinnacle Wealth Planning Services, Mansfield	419.526.5226	\$450 million	\$120 million	\$8.6 million	\$2.5 million
Paul J. Nikolai	Deloitte Investment Advisors, Cincinnati	513.784.7193	\$9 billion	\$190 million	\$14 million	\$2 million
John Ritter, CFP, CFS	Ritter Danher Financial Advisory, Cincinnati	513.233.0715	\$115 million	\$5 million	\$1.5 million	\$0.5 million
Peggy Ruhlin, CPA, CFP, PFS	Budros, Ruhlin & Roe, Columbus	614.481.6900	\$1.4 billion	\$28 million	\$4.4 million	\$0.5 million
Neil Waxman, CFP	Capital Advisors, Shaker Heights	216.295.7900	\$516 million	\$82.3 million	\$21.5 million	\$2 million
Oregon						
Tim Phillips	Phillips & Company, Portland	503.224.0858	\$500 million	\$1 billion	\$45 million	N/A
Pennsylvania						
Paul Bracaglia, CPA	myCIO Wealth Partners, Philadelphia	267.295.3889	\$5.9 billion	\$50 million	\$25 million	\$1 million
Gregory Curtis	Greycourt & Company, Pittsburgh	412.361.0100	\$9.1 billion	\$160 billion	\$200 million	\$25 million
Scott Holstein, CPA, CFP, PFS	Walnut Street Securities, Feasterville Trevose	800.458.9330	\$20 billion	\$17 million	\$2 million	\$1.5 million
Edd H. Hyde, CFP, CIMA	Radnor Financial Advisors, Wayne	610.975.0284	\$747 million	N/A	\$11 million	\$5 million
David Lees, CPA, CFA, CAIA	myCIO Wealth Partners, Philadelphia	267.295.2281	\$5.9 billion	\$2.2 billion	\$27 million	\$2 million
Diane M. Pearson, CFP	Legend Financial Advisors, Pittsburgh	888.236.5960	\$333 million	\$22 million	\$2.5 million	\$1 million
Grant Rawdin, JD, CFP	Wescott Financial Advisory Group, Philadelphia	215.979.1602	\$1.55 billion	\$225 million	\$23 million	\$2 million
Louis Stanasolovich, CFP	Legend Financial Advisors, Pittsburgh	412.635.9210	\$333 million	\$96 million	\$2.9 million	\$1 million
South Carolina						
Cheryl Holland, CFP	Abacus Planning Group, Columbia	803.933.0054	\$525 million	\$93 million	\$3.4 million	N/A
Tennessee						
Jay Healy, CFP	Century Wealth Management, Memphis	901.850.5532	\$89 million	\$36 million	\$2 million	\$1 million
Howard Safer, MBA, CPA, PFS	Regions Morgan Keegan Trust, Nashville	615.313.2174	\$140 billion	\$30 million	\$7 million	\$1 million
John Ueleke, MBA, CFP, ChFC, CLU	Legacy Wealth Management, Memphis	901.758.9006	\$650 million	\$100 million	\$8 million	\$5 million
Texas						
Janet Briaud, CFP	Briaud Financial Planning, Bryan	979.260.9771	\$460 billion	\$30 million	\$5 million	\$5 million
Cole Dawson, MBA	Telemus Capital Partners, Houston	713.621.1777	\$3.3 billion	\$400 million	\$25 million	\$10 million
David Diesslin, MBA, CFP	Diesslin & Associates, Fort Worth	817.332.6122	\$588 million	\$100 million	\$5 million	N/A
John Eadie, CPA, CFP, CFA, PFS, CIMA	Frost Bank Wealth Mgmt. Services, San Antonio	210.220.6187	\$24.8 billion	\$500 million	\$18 million	\$5 million
Alan Goldfarb, MBA, CFP	Weaver and Tidwell Financial Advisors, Dallas	972.960.1100	\$358 million	\$38 million	\$3.7 million	\$1 million
Mark Groesbeck, MBA, CFP, CLU, ChFC, CLU	Stanford Group, Houston	713.964.8356	\$50 billion	\$44 million	\$2.2 million	\$0.25 million
Richard Joyner, CPA, CFP, CFA, PFS, CIMA	Tolleson Wealth Management, Dallas	214.780.2512	\$2.3 billion	\$500 million	\$60 million	\$10 million
Richard Lee, CFP, CFA	Lee Financial Corporation, Dallas	972.960.1001	\$995 million	\$475 million	\$11.5 million	\$5 million
Mary Margolis, CPA, CFP, PFS	Stavis Margolis Advisory Services, Houston	713.552.9277	\$19 billion	\$62 million	\$7.4 million	\$1 million
John Merrill	Merrill Lynch, Houston	713.658.1335	\$1.8 trillion	\$500 million	\$25 million	\$10 million
Gregory A. Reid, MBA, CIMA	Telemus Capital Partners, Houston	713.548.2601	\$3 billion	\$500 million	\$25 million	\$5 million
James R. Waters, MBA, CFP	Partners In Wealth, Houston	713.964.4028	\$124 million	\$23 million	\$4.6 million	N/A

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FIRM, CITY	PHONE	FIRM ASSETS	LARGEST CLIENT'S NET WORTH	MEDIAN CLIENT NET WORTH	MINIMUM ASSETS FOR NEW CLIENT
Utah					
John Bird, MBA, CFP, CFA Albion Financial Group, Salt Lake City	801.487.3700	\$639 million	\$90 million	\$3.5 million	\$1 million
Vermont					
Edward (Ted) Cronin Manchester Capital Management, Manchester	802.362.4410	\$1.6 trillion	\$650 million	\$10 million	\$25 million
Virginia					
James J. Bruyette, CPA, CFP Sullivan, Bruyette, Speros & Blayney, McLean	703.734.9321	\$2 billion	\$140 million	\$5 million	\$1 million
Glen Buco, CFP West Financial Services, McLean	703.847.2500	\$711 million	\$39 million	\$8.7 million	\$1 million
Patricia Houlihan Houlihan Financial Resource Group, Reston	703.796.0800	\$126 million	\$21 million	\$7 million	\$1 million
Michael Joyce, MBA, CFP, CFA JoycePayne Partners, Richmond	800.784.6771	\$391 million	\$100 million	\$3 million	N/A
Joseph Montgomery, CFP Optimal Services Grp. of Wachovia Sec., Williamsburg	757.220.1782	\$1.1 trillion	\$1 billion	\$9.2 million	\$5 million
Keith Muth, CPA, CFP, CFA, PFS, CDFA Virginia Asset Management, Midlothian	804.327.0409	\$11.6 billion	\$69.3 million	\$3 million	\$1 million
Washington					
Robert Blume, CPA, CFP Washington Trust Bank, Spokane	509.353.4156	\$1.4 billion	\$65 million	\$4.5 million	\$0.5 million
Dean Braun Citi Family Office, Seattle	206.343.2922	\$1.7 trillion	\$1.2 billion	\$55 million	\$5 million
Jon Jones, CPA Brighton Jones, Seattle	206.329.5546	\$1.5 billion	\$185 million	\$23 million	\$15 million
Dale Miller Morgan Stanley, Bellevue	425.455.8000	\$779 million	\$150 million	\$10 million	\$3 million
Kathleen A. Miller, MBA, CFP Miller Advisors, Kirkland	425.822.8122	\$125 million	\$20 billion	\$4 million	\$0.5 million
Washington D.C.					
John Williams Citi Family Office, Washington D.C.	202.862.2876	\$1.7 trillion	\$2.5 billion	\$25 million	\$1 million
Wisconsin					
David Bohl, JD, CPA, CIMA Deloitte Investment Advisors, Milwaukee	414.347.6183	\$9 billion	\$50 million	\$9 million	\$3 million
Christopher G. Didier, MBA, CFA Robert W. Baird & Company, Milwaukee	414.765.7095	\$77 billion	\$1.5 billion	\$6.5 million	\$10 million
Vernon C. Sumnicht, PhD, MBA, CFP Sumnicht & Associates, Appleton	920.731.4455	\$354 million	\$103 million	\$62 million	\$2 million

CAIA: Chartered Alternative Investment Analyst; CAP: Chartered Advisor in Philanthropy; CFA: Chartered Financial Analyst; CFM: Certified Financial Manager; CFP: Certified Financial Planner; CFS: Certified Fund Specialist; CHF: Chartered Financial Consultant; CIMA: Certified Investment Management Analyst; CLU: Chartered Life Underwriter; CMFC: Chartered Mutual Fund Counselor; CPA: Certified Public Accountant; CTFA: Certified Trust and Financial Advisor; CWPP: Certified Wealth Preservation Planner; JD: Doctor of Law; LL.M: Master of Laws; MBA: Master of Business Administration; MS: Master of Science; PFS: Personal Financial Specialist; PhD: Doctorate

The Top 250 Methodology

THOSE FAMILIAR WITH *Worth's* annual Top Wealth Advisor issue will notice that this year's list has grown in size. For the past four years, we have identified the advisors whose dedication and expertise place them at the pinnacle of their profession. In each of those years, the task of choosing the 100 advisors to be recognized grew increasingly difficult because the number of deserving entrants escalated. This year, *Worth* received almost twice as many submissions as in 2007, driving competition for 100 winning slots to new extremes. Furthermore, the quality of individual responses to *Worth's* Advisor Questionnaire was higher than ever.

So in reviewing this year's submissions, the editorial team charged with selecting this year's winners realized that to fairly reflect the geographic diversity and professional excel-

lence of the wealth advisory industry, the list had to grow. And so it has—to 250.

While the number of wealth advisors on the list has changed, the methodology *Worth* editors use to select them has not. The process begins with an invitation to our readers to nominate those advisors who represent the absolute best of their profession. We also solicit nominations from banks, wealth management and investment firms, and industry associations. Nominated advisors and others who wish to participate then complete a detailed online questionnaire in which they provide their educational and professional credentials and discuss their approaches to customer service, portfolio management, and risk.

Based on the quality of these responses, and on each applicant's insights into the cur-

rent investment climate, *Worth* editors make the selections. Those advisors who take the time and space to fully explain a strategy or an opinion typically do well. We assume that they communicate in a similarly clear, thorough fashion with their clients. Those who demonstrate a nuanced understanding of the global markets, alternative investments and the current economic climate also score well. Following the completion of a preliminary list, the final step involves confirming, to the extent possible, that the information the advisors provided is accurate and truthful.

In the end, we feel confident in our choices. Those listed in the previous pages impress us with their expertise, dedication and enthusiasm. They are *Worth's* Top 250 Wealth Advisors for 2008. —DM