

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

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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 Tikou, 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 Danier 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 million	\$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 million	\$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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