



The Top 100 Wealth Advisors

	FIRM, CITY	PHONE	FIRM ASSETS	LARGEST CLIENT NET WORTH	MEDIAN CLIENT NET WORTH	MINIMUM ASSETS FOR NEW CLIENTS
Alabama						
Robert Studin, JD, CPA, CFP, CLU, ChFC, PFS	Lincoln Financial Advisors/ Lincoln Financial Group, Birmingham	205.803.3333	\$100 billion	\$60 million	\$8 million	No minimum
Arizona						
Laurie Bagley, CFA	Strategic Wealth Advisors, Scottsdale	480.998.1798	\$100 million	\$60 million	\$5 million	\$1 million
Thomas Connelly, CFA, CFP	Versant Capital Management, Phoenix	602.235.2663	\$130 million	\$40 million	\$5.5 million	\$2 million
Arkansas						
Cynthia L. Conger, MBA, CPA, PFS, CFP	Cynthia Conger, Little Rock	501.374.1174	\$25 million	\$10 million	\$1.3 million	No minimum
California						
James Berliner, JD	Westmount Asset Mgmt., Los Angeles	800.817.0602	\$580 million	\$110 million	\$375 million	\$1 million
Norman Boone, MBA, CFP	Mosaic Financial Partners, San Francisco	415.788.1952	\$225 million	\$25 million	\$8 million	\$1 million
Diane Bourdo, MBA, CFP	The Humphreys Group, San Francisco	415.928.0401	\$104 million	\$21 million	\$7 million	\$2 million
Joel Framson, CPA, PFS, CFP	Silver Oak Wealth Advisors, Los Angeles	310.443.0220	\$108 million	\$20 million	\$5.4 million	\$2 million
Jim Freeman, CFP	Financial Alternatives, La Jolla	858.459.8289	\$49 million	\$13 million	\$2.2 million	\$1 million
Meloni Hallock, MBA, CPA, PFS, CIMA	Acacia Wealth Advisors, Los Angeles	310.246.0570	\$600 million	\$1 billion	\$75 million	\$10 million
Neil Hokanson, CFP	Hokanson Capital Mgmt., Solana Beach	858.755.8899	\$245 million	\$43 million	\$2.5 million	\$1 million
David Hou, MBA	Merrill Lynch Private Banking & Invest., Los Angeles	310.407.4829	\$1.4 trillion	\$1.5 billion	\$32.5 million	\$10 million
Michael Johnston, MBA	Smith Barney, Irvine	949.955.7557	\$1.5 trillion	\$117 million	\$12 million	\$3 million
Debbie Jorgensen, CFP	Merrill Lynch, San Francisco	415.955.3782	\$1.6 trillion	\$105 million	\$15 million	\$5 million
S. Timothy Kochis, MBA, JD, CFP	Kochis Fitz, San Francisco	415.394.6670	\$1.3 billion	\$325 million	\$15 million	\$5 million
Michael Ladge, MBA	UBS Financial Services, Los Angeles	310.772.7070	\$525 billion	\$100 million	\$7 million	No minimum
Jeff J. Saccacio, CPA, PFS, ChFC	Citigroup Private Bank, Costa Mesa	714.428.6586	\$221 billion	\$310 million	\$35 million	\$5 million
Spencer Sherman, MBA	Abacus Wealth Partners, Sebastopol	707.829.6190	\$370 million	\$40 million	\$5 million	\$5 million
Christopher Wheaton, CPA, CFP	Litman/Gregory Asset Mgmt., Larkspur	415.461.8999	\$4.9 billion	\$1.4 billion	\$7.5 million	\$3 million
Colorado						
Judith Shine, CFP	Shine Investment Advisory Serv., Lone Tree	303.740.8600	\$350 million	\$57 million	\$4.5 million	\$1 million
Connecticut						
John F. (Jeff) Erdmann III, CFM	Merrill Lynch Private Banking & Invest., Greenwich	203.861.5902	\$1.4 trillion	\$1 billion	\$20 million	\$3 million
Delaware						
Benjamin Ledyard, JD	Wilmington Trust, Wilmington	302.651.8901	\$36.5 billion	\$2 billion	\$40 million	\$5 million
Ralph C. Wilczek, CPA, CFP, CTFA	Wilmington Trust, Wilmington	302.651.1985	\$36.5 billion	\$80 million	\$7 million	\$3 million
Florida						
Louis Chiavacci, MBA, CFM	Merrill Lynch Private Banking & Invest., Coral Gables	305.774.0500	\$1.4 trillion	\$3 billion	\$70 million	\$10 million
Harold Evensky, CFP	Evensky & Katz, Coral Gables	305.448.8882	\$500 million	\$30 million	\$75 million	No minimum
Brent Fykes, CFA, CFP	Asset Mgmt. Advisors, Palm Beach Gardens	561.746.8444	\$6.8 billion	\$500 million	\$40 million	\$10 million
Robert Isbitts	Emerald Asset Advisors, Weston	954.385.9624	\$205 million	\$75 million	\$375 million	\$1 million
Linda Lubitz, CFP	The Lubitz Financial Group, Miami	305.670.4440	\$130 million	\$28 million	\$4.5 million	\$1 million
Marc Singer, MBA, CFP	Singer Xenos Wealth Mgmt., Coral Gables	305.443.0060	\$600 million	\$130 million	\$4 million	\$1 million
Georgia						
Anthony Guinta, CPA, CFP, PFS	Homrich & Berg, Atlanta	404.264.1400	\$1 billion	\$1 billion	\$6 million	\$2 million
Ron Hughes Jr., MBA, CFM	Merrill Lynch Private Banking & Invest., Atlanta	404.231.2558	\$1.4 trillion	\$250 million	\$20 million	\$10 million
Illinois						
Brent Brodeski, MBA, CPA, CFP, CFA	Savant Capital Management, Rockford	815.227.0300	\$759 million	\$43 million	\$1.8 million	\$1 million
Steven B. Weinstein, JD, MBA, CFP, CFA	Altair Advisers, Chicago	312.429.3013	\$1.7 billion	\$1 billion	\$10 million	\$5 million
Iowa						
Phil M. Kruzan Sr., CFP	Foster Group (Zero Alpha), West Des Moines	515.226.9000	\$532 million	\$60 million	\$4 million	\$1 million