



Monday, August 27, 2012

Barron's: Top 100 Independent Wealth Advisors 2012

Here are America's top independent financial advisors, as identified by Barron's. The ranking reflects the volume of assets overseen by the advisors and their teams, revenues generated for the firms and the quality of the advisors' practices. The scoring system assigns a top score of 100 and rates the rest by comparing them with the winner. A ranking of "N" denotes an advisor who is new to the list.

Rank	'12	'11	Name	Firm	Location	Customers						Score			
						Individuals (Up to \$1mil)	High Net Worth (\$1-10 mil)	Ultra- High Net Worth (\$10 mil+)	Foundations	Endowments	Institutional		Total Assets (\$mil)	Typical Account (\$mil)	Typical Net Worth (\$mil)
1	2		Ric Edelman	Edelman Financial Svcs	Fairfax, Va.	.	.	.	.	.	.	7867	0.46	1	100.000
2	1		Steve Lockshin	Convergent Wealth Advisors	Los Angeles, Calif.	.	.	.	.	.	.	10089	35.5	51	99.263
3	4		Robert A. Clarfeld	Clarfeld Wealth	Tarrytown, N.Y.	.	.	.	.	.	.	4165	20	50	99.043
4	10		Peter Mallouk	Creative Planning Churchill Management Group	Leawood, Kan.	.	.	.	.	.	.	3454	1.2	3.8	98.941
5	5		Fred Fern	Convergent Wealth Advisors	Los Angeles, Calif.	.	.	.	.	.	.	2907	0.75	1.5	98.767
6	3		David Zier	Mariner Holdings/Mariner Wealth Advisors	Potomac, Md.	.	.	.	.	.	.	10089	35.5	51	98.500
7	6		Martin Bicknell	Constellation Wealth Advisors	Leawood, Kan.	.	.	.	.	.	.	13023	2	5	98.214
8	12		Jon Goldstein	HighTower Carson Wealth Management	Menlo Park, Calif.	.	.	.	.	.	.	5200	35	50	97.213
9	9		Richard Saperstein	myCIO Wealth Partners	New York, N.Y.	.	.	.	.	.	.	8252	20	50	97.018
10	8		Ron Carson	Essex Financial Services, Inc.	Omaha, Neb.	.	.	.	.	.	.	3086	5	10	96.890
11	13		David Lees	Constellation Wealth Advisors	Philadelphia, Pa.	.	.	.	.	.	.	7147	22	28	96.743
12	14		John W. Rafal	Gresham Partners, LLC	Essex, Conn.	.	.	.	.	.	.	3776	5.5	12	96.528
13	11		Paul Tramontano	Luminous Capital ThomasPartners, Inc.	New York, N.Y.	.	.	.	.	.	.	5200	40	75	96.397
14	N		Edward Neild, IV	Freestone Capital Management	Chicago, Ill.	.	.	.	.	.	.	3664	50	50	96.097
15	38		David Hou	Waldron Wealth Management	Los Angeles, Calif.	.	.	.	.	.	.	6100	15	25	95.514
16	20		Gregory Thomas	Signature Estate & Investment Advisors, llc	Wellesley, Mass.	.	.	.	.	.	.	2196	1.5	5	95.057
17	22		Erik Morgan	Zhang Financial (LPL)	Seattle, Wash.	.	.	.	.	.	.	2226	6	10	94.865
18	21		John Waldron	Aspiriant	Pittsburgh, Pa.	.	.	.	.	.	.	2514	10	25	94.861
19	25		Brian Holmes	Manchester Capital Management	Los Angeles, Calif.	.	.	.	.	.	.	2383	5	15	93.949
20	37		Charles Zhang	Financial Network Group	Portage, Mich.	.	.	.	.	.	.	1582	3	5	93.936
21	18		Rob Francais		Los Angeles, Calif.	.	.	.	.	.	.	6767	8	25	93.930
22	24		Edward (Ted) Cronin		Manchester, Vt.	.	.	.	.	.	.	1903	20	45	93.537
23	27		Nathan Bachrach		Cincinnati, Ohio	.	.	.	.	.	.	1538	0.9	1.75	93.349

24	72	Richard Jr. Burrige	RMB Capital Management	Chicago, Ill.	.	.	.	2668	3.4	5	93.079
25	73	Frederick Paulman	RMB Capital Management	Chicago, Ill.	.	.	.	2668	3.4	5	92.969
26	15	Gary Ran	Telemus Capital Partners	Southfield, Mich.	.	.	.	1726	3.8	17	92.909
27	28	Steven Weinstein	Altair Advisers	Chicago, Ill.	.	.	.	3060	10	20	92.295
28	26	John LaPann	Federal Street Advisors	Boston, Mass.	.	.	.	3937	50	60	92.229
29	70	Robert Mellon	Freestone Capital Management	Seattle, Wash.	.	.	.	2226	6	10	91.996
30	30	Michael Yoshikami	Destination Wealth Management	Walnut Creek, Calif.	.	.	.	1250	2	5	91.879
31	34	Timothy Grimes	Grimes & Co.	Westborough, Mass.	.	.	.	1287	3.5	7	91.532
32	17	Mark Sear	Luminous Capital	Los Angeles, Calif.	.	.	.	6100	16	25	91.420
33	32	Mitchell Eichen	The MDE Group	Morristown, N.J.	.	.	.	1360	7	9	91.396
34	N	William Rice	Anchor Capital Advisors	Boston, Mass.	.	.	.	6300	2	3	91.357
35	N	Sandi Bragar	Aspiriant	San Francisco, Calif.	.	.	.	6767	8	25	91.230
36	35	Dale Yahnke	Dowling & Yahnke	San Diego, Calif.	.	.	.	2056	2.3	7	91.010
37	29	John Lesser	Plante Moran	Auburn Hills, Mich.	.	.	.	9430	18.64	45.8	91.005
38	44	Christopher Cordaro	RegentAtlantic Capital	Morristown, N.J.	.	.	.	2298	7	15	90.870
39	42	Grant Rawdin	Wescott Financial Advisory Group	Philadelphia, Pa.	.	.	.	1766	5	20	90.812
40	31	Jeanie Wyatt	South Texas Money Management	San Antonio, Texas	.	.	.	1955	0.87	3	90.602
41	39	David Kudla	Mainstay Capital Management	Grand Blanc, Mich.	.	.	.	1200	0.5	3	90.292
42	46	Jeffrey Colin	Baker Street Advisors	San Francisco, Calif.	.	.	.	4399	20	30	90.254
43	54	Greg Miller	Wellesley Investment Advisors	Wellesley, Mass.	.	.	.	1180	1.8	10	90.181
44	49	Thomas Myers	Brownson, Rehms & Foxworth	Menlo Park, Calif.	.	.	.	8095	25	40	90.060
45	47	Scott Tiras	Ameriprise Financial	Houston, Texas	.	.	.	2199	2	3.5	85.970
46	50	Colin Carter	The Presidio Group	Dallas, Texas	.	.	.	5143	23	50	85.944
47	60	Charles Brighton	Brighton Jones	Seattle, Wash.	.	.	.	2300	15	25	85.940
48	19	Debra Wetherby	Wetherby Asset Management	San Francisco, Calif.	.	.	.	3819	10	15	85.929
49	65	Jon Jones	Brighton Jones	Seattle, Wash.	.	.	.	2300	15	20	85.920
50	57	Drew McMorrow	Ballentine Partners	Waltham, Mass.	.	.	.	6654	50	50	85.897
51	48	Mark Dixon	Plante Moran Financial Advisors	Southfield, Mich.	.	.	.	9430	8.4	12.8	85.768
52	41	Susan Kaplan	Kaplan Financial Services	Newton, Mass.	.	.	.	1300	3.5	10	85.736
53	N	Patrick McClain	Hanson McClain Advisors	Sacramento, Calif.	.	.	.	1423	0.5	1	85.714
54	53	Scott T. Hanson	Hanson McClain Advisors	Sacramento, Calif.	.	.	.	1423	0.5	1	85.709
55	51	David Bugen	RegentAtlantic Capital	Morristown, N.J.	.	.	.	2298	7	13	85.515
56	58	Michael van den Akker	Baker Street Advisors	San Francisco, Calif.	.	.	.	4399	20	30	85.477

57	64	Claudia Shilo	Ballentine Partners	Wolfeboro, N.H.	.	.	.	.	6654	50	50	85.407
58	52	Kevin Timmerman	Steele Capital Management	Dubuque, Iowa	.	.	.	.	1300	0.75	2	85.396
59	40	Aaron Izenstark	IRON Financial	Northbrook, Ill.	.	.	.	.	1530	1	10	85.390
60	N	Doug Allison	Beacon Pointe Advisors	Newport Beach, Calif.	.	.	.	.	4535	7	15	85.385
61	33	Andy Berg	Homrich Berg	Atlanta, Ga.	.	.	.	.	2300	5	7	85.362
62	63	Joel Isaacson	Joel Isaacson & Co.	New York, N.Y.	.	.	.	.	4230	10	15	85.242
63	43	Michael Nathanson	The Colony Group	Boston, Mass.	.	.	.	.	1375	2.5	8	85.200
64	55	Brent Brodeski	Savant Capital	Rockford, Ill.	.	.	.	.	2202	1	3	85.149
65	62	Stephan Cassaday	Cassaday & Co.	McLean, Va.	.	.	.	.	983	1	2	85.117
66	56	Gregg Fisher	Gerstein Fisher	New York, N.Y.	.	.	.	.	2201	1.5	5	85.035
67	61	Stewart Massey	Massey, Quick & Co.	Morristown, N.J.	.	.	.	.	3248	16.82	50	84.973
68	N	Feroz Ansari	Compak Asset Management	Newport Beach, Calif.	.	.	.	.	575	0.5	2	84.910
69	77	Lon Morton	Morton Capital Management	Calabasas, Calif.	.	.	.	.	1108	4	7	84.881
70	N	Jim Berliner	Westmount Asset Management	Los Angeles, Calif.	.	.	.	.	1463	2	5	84.880
71	66	Greg Sullivan	Harris SBSB	McLean, Va.	.	.	.	.	2240	5	9	84.846
72	71	Bruce Brugler	The Presidio Group	San Francisco, Calif.	.	.	.	.	5143	23	50	84.704
73	67	Jeffrey Lancaster	Bingham, Osborn & Scarborough	San Francisco, Calif.	.	.	.	.	2358	3	6	84.663
74	N	Todd Millay	Choate Investment Advisors	Boston, Mass.	.	.	.	.	2764	4	8	84.636
75	59	Thomas B. Gau	Retirement Planning Specialists	Ashland, Ore.	.	.	.	.	1450	2	5	84.498
76	N	Paul Taghibagi	Signature Estate & Investment Advisors	Los Angeles, Calif.	.	.	.	.	2383	1.65	8	84.485
77	68	Kevin Myeroff	NCA Financial Planners	Cleveland, Ohio	.	.	.	.	1064	1.5	2.5	84.450
78	85	Charles Thoele	Robertson, Grieger & Thoele Financial Advisors	Dallas, Texas	.	.	.	.	1700	8	25	84.405
79	88	James B. Stack	Stack Financial Management	Whitefish, Mont.	.	.	.	.	699	1.5	5	84.282
80	79	Shari Burns	Paragon Investment Management	Seattle, Wash.	.	.	.	.	1373	5	10	84.222
81	81	Wally Obermeyer	Asset Management	Aspen, Colo.	.	.	.	.	792	2.5	5	84.100
82	75	John Adams Vaccaro	Westport Resources	Westport, Conn.	.	.	.	.	1063	3	10	84.099
83	91	Jonathan Kuttin	Ameriprise Financial	Melville, N.Y.	.	.	.	.	1250	0.95	3.9	84.092
84	N	Richard Joyner	Tolleson Wealth Management	Dallas, Texas	.	.	.	.	1309	30	60	84.080
85	N	Matthew Young	Richard C. Young & Co.	Newport, R.I.	.	.	.	.	926	1.63	5	84.000
86	N	Paul Pagnato	HighTower	Reston, Va.	.	.	.	.	1710	25	40	84.000
87	78	Gerard Klingman	Raymond James	New York, N.Y.	.	.	.	.	1093	7	12	83.998
88	86	Andrew Palmer	Bel Air Investment Advisors	Los Angeles, Calif.	.	.	.	.	1687	20	50	83.930

89	87	Michael Chasnoff	Truepoint	Cincinnati, Ohio	.	.	.	1102	2.5	4.5	83.921
90	N	Laila Pence	Pence Wealth Management	Newport Beach, Calif.	.	.	.	859	2	5	83.857
91	N	Kenneth Moraif	Money Matters with Ken Moraif	Plano, Texas	.	.	.	642	0.4	1.04	83.836
92	95	Charles Doty	Asset Preservation Advisors	Atlanta, Ga.	.	.	.	1900	3	20	83.760
93	N	E. Geoffrey Sella	SPC Financial/Raymond James	Rockville, Md.	.	.	.	567	0.68	0.8	83.689
94	89	Randall Linde	Ameriprise Financial	Renton, Wash.	.	.	.	1209	0.5	1.2	83.530
95	N	Joshua Gross	Mill Creek Capital Advisors	Conshohocken, Pa.	.	.	.	2708	13	20	83.524
96	76	Chuck Bean	Heritage Financial Services	Westwood, Mass.	.	.	.	675	3	5	83.469
97	93	Gary Price	Strategic Capital Group	Gig Harbor, Wash.	.	.	.	940	5	10	83.427
98	N	John Eadie	Covenant Multi-Family Offices	San Antonio, Texas	.	.	.	1200	7.5	15	83.376
99	99	Eric Koeplin	The Milestone Group	Denver, Colo.	.	.	.	1293	5	10	83.225
100	84	Van Percy	Raymond James	Midland, Texas	.	.	.	925	2	5	83.131

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