

Directory of Barron's-Ranked Financial Advisors



	Name	Firm / City	Phone, E-Mail & Website	Retail	High Net Worth	Ultra-High Net Worth	Foundations	Endowments	Institutional	Team Total Assets	Typical Account Size	Typical Net Worth
				(Up to \$1 mil)	(\$1-10 mil)	(\$10 mil+)				(\$mil)	(\$mil)	(\$mil)
PENNSYLVANIA	Robert Boland	RBC WM Philadelphia	(215) 557-1702 / robert.boland@rbc.com www.bolandinvestmentgroup.com	•	•	•			•	\$978	\$6.9	\$20
	Patricia C. Brennan	Key Financial West Chester	(610) 429-9050 / pbrennan@keyfinancialinc.com keyfinancialinc.com	•	•					584	1.8	3
	William H. Brown, Jr.	Merrill Lynch WM Sewickley	(412) 749-7912 / william_brownjr@ml.com www.fa.ml.com/thebrownhurrayplantzgroup	•	•	•				880	2	5
	Anthony DiValerio, Jr.	Morgan Stanley PWM West Conshohocken	(610) 260-7049 / anthony.divalerio@morganstanleypwm.com www.morganstanleyfa.com/frontstreetgroup		•	•	•			1,200	30	75
	Joshua Gross	Mill Creek Capital Advisors Conshohocken	(610) 941-7714 / jgross@millcreekcap.com www.millcreekcap.com		•	•	•	•	•	3,575	14	25
	Gregory Hayes	Merrill Lynch WM Yardley	(267) 757-1409 / greg_hayes@ml.com fa.ml.com/gregory_hayes	•	•	•	•		•	695	1	2.5
	Barbara Hudock	Hudock Moyer Wealth Res Williamsport	(866) 855-0569 / bhudock@hudockcapital.com www.hudockcapital.com	•	•	•	•	•		547	3	5
	James Meredith	Hefren-Tillotson Pittsburgh	(412) 633-1574 / meredithgroup@hefren.com www.hefren.com	•	•	•			•	1,453	1.8	4.3
	J. Douglas Moran	Merrill Lynch WM Wayne	(610) 687-7925 / jdouglas_moran@ml.com fa.ml.com/jdm	•	•	•				342	3.5	4.5
	Robert P. Moran, Jr.	Merrill Lynch WM Exton	(610) 594-1131 / robert_moranjr@ml.com fa.ml.com/robert_moranjr	•	•	•			•	394	1.5	3
	John Parker	Wells Fargo Advisors Philadelphia	(215) 564-8487 / john.j.parker@wfadvisors.com home.wellsfargoadvisors.com/john.j.parker	•	•	•				1,530	3	5
	Eric Salmansohn	Morgan Stanley WM Philadelphia	(215) 854-6272 / eric.salmansohn@morganstanley.com www.morganstanleyfa.com/libertywealthmanagementgroup		•	•	•			1,431	3	10
	Thomas Seiler	Raymond James Newtown	(855) 473-4537 / thomas.seiler@raymondjames.com raymondjames.com/theseilergroup	•	•	•	•		•	625	5	6
	John Solis-Cohen	Wells Fargo Advisors Jenkintown	(215) 572-4276 / john.solis-cohen@wfadvisors.com	•	•	•				896	3	5
D. Scott Wisman	Merrill Lynch WM Exton	(610) 594-1186 / scott_wisman@ml.com fa.ml.com/wisman_willisgroup	•	•	•				802	2.5	4	
R.I.	Malcolm Makin	Raymond James Westerly	(401) 596-2800 / mmakin@ppgadvisors.com ppgadvisors.com	•	•	•		•		1,055	1.5	3
	David Reiser	Morgan Stanley WM Newport	(855) 899-0509 / david.r.reiser@morganstanley.com www.morganstanleyfa.com/reiser/index.htm	•	•	•				452	2	3
	Matthew A. Young	Richard C. Young & Co. Newport	(888) 456-5444 / info@younginvestments.com www.younginvestments.com	•	•	•				973	1.76	5
S.C.	Derrick Sullivan	Morgan Stanley WM Charleston	(843) 727-7771 / derrick.a.sullivan@morganstanley.com www.morganstanleyfa.com/thesullivancrawfordgroup	•	•	•	•	•		936	8	20
S.D.	Gordon Wollman	Raymond James Sioux Falls	(605) 352-9490 / cfs@gordonwollman.com www.gordonwollman.com	•	•	•				255	0.8	1.7
TENNESSEE	Christi Edwards	Morgan Stanley WM Nashville	(615) 298-6554 / christi.edwards@morganstanley.com www.morganstanleyfa.com/christi.edwards	•	•	•				658	3	5
	Eric Klindt	Merrill Lynch PBIG Nashville	(615) 747-5625 / eklindt@ml.com pwa.ml.com/klindtcole		•	•	•	•		890	15	30
	Dugan McLaughlin	Merrill Lynch PBIG Knoxville	(865) 521-8805 / dugan_mclaughlin@ml.com www.pbig.ml.com		•	•	•	•	•	674	17	25
	Mitzi Michaelson	Merrill Lynch WM Brentwood	(615) 750-1057 / mitzi_c_michaelson@ml.com www.fa.ml.com/wallace_michaelson	•	•	•				360	1.66	3
TEXAS	Bonner C. Barnes	Corda Investment Mgmt Houston	(713) 439-0665 / bonner@cordamanagement.com www.cordamanagement.com	•	•					675	0.5	1.5
	James Coffee	Merrill Lynch WM Houston	(713) 658-1386 / james_coffeejr@ml.com www.fa.ml.com/james_coffeejr	•	•					3,939	5	7
	Don Donnally	J.P. Morgan Securities Dallas	(214) 979-7770 / chester.donnally@jpmorgan.com www.jpmorgansecurities.com/donnallygroup	•	•	•	•			3,600	12	35

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				Retail (Up to \$1 mil)	High Net Worth (\$1-10 mil)	Ultra-High Net Worth (\$10 mil+)						
TEXAS	Ira Kravitz	UBS Financial Services Plano	(469) 440-0547 / ira.kravitz@ubs.com financialservicesinc.ubs.com/team/kravitzgroup/	•	•	•				\$577	\$4.5	\$6
	John Merrill	Tanglewood WM Houston	(713) 840-8880 / www.tanglewoodwealth.com	•	•	•				833	2.5	5
	Marie A. Moore	Morgan Stanley WM Dallas	(214) 696-7175 / marie.a.moore@ms.com www.morganstanleyfa.com/themooregroup/	•	•	•				360	5	15
	Darrell Pennington	Ameriprise Financial Houston	(713) 332-4422 / darrell.r.pennington@ampf.com www.penningtonwealth.com	•	•	•				742	1.5	2.5
	Richard Piatas	Merrill Lynch WM Dallas	(972) 386-1349 / richard.piatas@ml.com www.fa.ml.com/richard.piatas	•	•	•				2,555	10	25
	R. Scot Smith	Morgan Stanley WM Dallas	(214) 696-7064 / scot.smith@morganstanley.com	•	•	•	•			475	2	3
	Murray Snow	Morgan Stanley WM Houston	(713) 966-2177 / murray.snow@ms.com morganstanleyfa.com/thesnowgroup	•	•	•	•			700	2.5	5
	Scott Tiras	Ameriprise Financial Houston	(713) 332-4400 / scott.b.tiras@ampf.com tiraswealth.com	•	•	•				1,902	2	3.5
UT.	Hal Anderson	Soltis Investment Adv St. George	(800) 735-1601 / hal@soltisadvisors.com www.soltisadvisors.com	•	•	•		•		1,690	8	15
VT.	Jennifer Kelley	Wells Fargo Advisors Burlington	(802) 864-2667 / jen.kelley@wfadvisors.com www.kelleybrooks.wfadv.com	•	•	•				277	1.25	2.5
	Tim Stotz	Morgan Stanley WM Burlington	(802) 863-7709 / timothy.stotz@morganstanley.com	•	•	•	•	•	•	703	2.5	4
VIRGINIA	Garret Alcaraz	Wells Fargo Advisors Virginia Beach	(757) 431-6375 / gary.alcaraz@wfadvisors.com www.alcarazfisherjustiswmg.wfadv.com	•	•	•	•	•	•	1,454	1.5	3.5
	Tristan Caudron	Wells Fargo Advisors Alexandria	(703) 739-4548 / tristan.caudron@wfadvisors.com www.speckcaudron.com	•	•	•	•	•	•	1,525	1.5	2.5
	Barry Glassman	Glassman Wealth Services McLean	(703) 534-4444 / lisa@glassmanwealth.com www.glassmanwealth.com	•	•	•				793	7	10
	Michael Joyce	JoycePayne Partners Richmond	(804) 358-2702 / mjoyce@joycepaynepartners.com www.joycepaynepartners.com	•	•	•				640	2.5	3
	Soo Kim	Ameriprise Financial Vienna	(703) 226-2300 / soo.m.kim@ampf.com www.ameripriseadvisors.com/soo.m.kim/	•	•	•				1,025	0.75	1.5
	Jeff LeClair	Wells Fargo Advisors McLean	(703) 760-5717 / jeff.leclair@wellsfargo.com www.leclairlemlihapproach.com	•	•	•	•	•	•	1,234	5	20
	Joseph Montgomery	Wells Fargo Advisors Williamsburg	(888) 465-8422 / joe.montgomery@wellsfargoadvisors.com www.osg.wfadv.com	•	•	•	•	•	•	15,205	7	15
	Paul Pagnato	HighTower Reston	(703) 468-2700 / pk@hightoweradvisors.com www.hightoweradvisors.com/pagnatokarp	•	•	•	•			2,354	25	40
	Gregory S. Smith	Robert W. Baird Reston	(571) 203-1600 / gssmith@rwbaird.com www.thewiseinvestorgroup.com	•	•	•				2,230	1.02	3
	Ryan Sprowls	Wells Fargo Advisors Alexandria	(703) 739-1439 / ryan.sprohls@wellsfargoadvisors.com sdkwealth.com	•	•	•	•	•	•	1,000	1.25	2.5
	Greg Sullivan	SBSB McLean	(703) 734-9322 / greg.sullivan@sbsbinc.com www.sbsbinc.com	•	•	•	•		•	2,854	5	10
	Eric Wightman	Robert W. Baird Reston	(571) 203-1600 / ewightman@rwbaird.com www.thewiseinvestorgroup.com	•	•	•				2,230	1	3
	WASHINGTON	Michael Ernst	Morgan Stanley WM Bellevue	(425) 453-5833 / michael.j.ernst@morganstanley.com www.morganstanleyfa.com/northwestcapitalgroup	•	•	•	•		•	890	0.5
David Hay		Evergreen Gavekal Bellevue	(425) 467-4600 / dhay@evergreengavekal.com evergreengavekal.com	•	•	•		•		1,368	1.2	5
Lawrence Hood		Pacific Portfolio Seattle	(206) 623-6641 / larry@pacific-portfolio.com www.pacific-portfolio.com	•	•	•	•		•	2,884	11	18
Randall Linde		AGP Wealth Advisors Renton	(800) 563-1636 / randall.s.linde@ampf.com www.agpwealthadvisors.com	•	•	•				1,688	0.75	1.5

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WASHINGTON	Michael Matthews	UBS Financial Services Bellevue	(425) 451-2350 / m.matthews@ubs.com www.ubs.com/fa/mmatthews	•	•	•				602	3.5	6
	Erik Morgan	Freestone Capital Mgmt Seattle	(206) 707-7310 / erik@freestonecapital.com www.freestonecapital.com	•	•	•				\$3,105	\$5	\$11
	Erin Scannell	Ameriprise Financial Mercer Island	(425) 709-2345 / erin.j.scannell@ampf.com www.heritage-wealth.com	•	•	•			•	1,520	1.5	2
	Kathleen Weber	Morgan Stanley WM Bellevue	(425) 451-3320 / kathleen.l.weber@morganstanley.com www.morganstanleyfa.com/weber	•	•	•				547	5	7
	Jason Weese	Morgan Stanley WM Bellevue	(425) 453-6916 / jason.weese@ms.com www.morganstanleyfa.com/jason.weese/		•	•	•			875	7.5	20
W. VA.	David Miller	RBC WM Huntington	(304) 697-2030 / david.j.miller@rbc.com themillerinvestmentgroup.com	•	•	•				261	0.25	0.75
	Fred Scheeren	Wells Fargo Advisors Wheeling	(304) 232-2550 / fred.scheeren@wfadvisors.com www.wfadvisors.com/fred.scheeren	•	•	•			•	558	1.1	5
WI.	Andrew Burish	UBS Financial Services Madison	(608) 831-4282 / andrew.burish@ubs.com www.ubs.com/team/burishgroup	•	•	•	•	•	•	3,428	2	3
	David Spano	Annex WM Elm Grove	(262) 786-6363 / dspano@annexwealth.com www.annexwealth.com	•	•					507	0.4	0.8

This directory features advisors whom Barron's has ranked in one of its four annual financial advisor rankings. Ranked advisors who wish to appear in this section should contact Rob Walkley at 609-520-7184 or robert.walkley@dowjones.com. Advisors who wish to apply for a ranking should contact Matt Barthel at 212-416-2709 or matthew.barthel@dowjones.com.