



























# Directory of Barron's-Ranked Financial Advisors



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

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

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|            | Name             | Firm / City                           | Phone, E-Mail & Website                                                                                                                                                                         | Retail<br>(Up to \$1 mil) | High Net Worth<br>(\$1-10 mil) | Ultra-High Net Worth<br>(\$10 mil+) | Foundations | Endowments | Institutional | Team Total<br>Assets (\$mil) | Typical Account<br>Size (\$mil) | Typical Net<br>Worth (\$mil) |
|------------|------------------|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|--------------------------------|-------------------------------------|-------------|------------|---------------|------------------------------|---------------------------------|------------------------------|
| WASHINGTON | Michael Matthews | UBS Financial Services<br>Bellevue    | (425) 451-2350 / <a href="mailto:m.matthews@ubs.com">m.matthews@ubs.com</a><br><a href="http://www.ubs.com/fa/mmatthews">www.ubs.com/fa/mmatthews</a>                                           | •                         | •                              | •                                   |             |            |               | 602                          | 3.5                             | 6                            |
|            | Erik Morgan      | Freestone Capital Mgmt<br>Seattle     | (206) 707-7310 / <a href="mailto:erik@freestonecapital.com">erik@freestonecapital.com</a><br><a href="http://www.freestonecapital.com">www.freestonecapital.com</a>                             | •                         | •                              | •                                   |             |            |               | \$3,105                      | \$5                             | \$11                         |
|            | Erin Scannell    | Ameriprise Financial<br>Mercer Island | (425) 709-2345 / <a href="mailto:erin.j.scannell@ampf.com">erin.j.scannell@ampf.com</a><br><a href="http://www.heritage-wealth.com">www.heritage-wealth.com</a>                                 | •                         | •                              | •                                   |             |            | •             | 1,520                        | 1.5                             | 2                            |
|            | Kathleen Weber   | Morgan Stanley WM<br>Bellevue         | (425) 451-3320 / <a href="mailto:kathleen.l.weber@morganstanley.com">kathleen.l.weber@morganstanley.com</a><br><a href="http://www.morganstanleyfa.com/weber">www.morganstanleyfa.com/weber</a> | •                         | •                              | •                                   |             |            |               | 547                          | 5                               | 7                            |
|            | Jason Weese      | Morgan Stanley WM<br>Bellevue         | (425) 453-6916 / <a href="mailto:jason.weese@ms.com">jason.weese@ms.com</a><br><a href="http://www.morganstanleyfa.com/jason.weese/">www.morganstanleyfa.com/jason.weese/</a>                   |                           | •                              | •                                   | •           |            |               | 875                          | 7.5                             | 20                           |
| W. VA.     | David Miller     | RBC WM<br>Huntington                  | (304) 697-2030 / <a href="mailto:david.j.miller@rbc.com">david.j.miller@rbc.com</a><br><a href="http://themillerinvestmentgroup.com">themillerinvestmentgroup.com</a>                           | •                         | •                              | •                                   |             |            |               | 261                          | 0.25                            | 0.75                         |
|            | Fred Scheeren    | Wells Fargo Advisors<br>Wheeling      | (304) 232-2550 / <a href="mailto:fred.scheeren@wfadvisors.com">fred.scheeren@wfadvisors.com</a><br><a href="http://www.wfadvisors.com/fred.scheeren">www.wfadvisors.com/fred.scheeren</a>       | •                         | •                              | •                                   |             |            | •             | 558                          | 1.1                             | 5                            |
| WI.        | Andrew Burish    | UBS Financial Services<br>Madison     | (608) 831-4282 / <a href="mailto:andrew.burish@ubs.com">andrew.burish@ubs.com</a><br><a href="http://www.ubs.com/team/burishgroup">www.ubs.com/team/burishgroup</a>                             | •                         | •                              | •                                   | •           | •          | •             | 3,428                        | 2                               | 3                            |
|            | David Spano      | Annex WM<br>Elm Grove                 | (262) 786-6363 / <a href="mailto:dspano@annexwealth.com">dspano@annexwealth.com</a><br><a href="http://www.annexwealth.com">www.annexwealth.com</a>                                             | •                         | •                              |                                     |             |            |               | 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](mailto: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](mailto:matthew.barthel@dowjones.com).**