

# Robb Report Worth

WEALTH IN PERSPECTIVE

## THE NATION'S 100 MOST EXCLUSIVE WEALTH ADVISORS

OUR  
ANNUAL  
DIRECTORY

### THE BOARD & THE CEO

Enron's Interim Chairman: Shifting the Balance of Power

### DOMESTIC ASSET PROTECTION TRUSTS

A Safer Alternative to Offshore Financial Shelters

Plus

## SPECIAL EXECUTIVE TRAVEL SECTION

OCTOBER 2004



0 09128 48172 2  
EIGHT DOLLARS U.S. \$10.00 CDN

CURT CO PUBLISHING, LLC

# 100 Top Financial Advisors (cont.)

	FIRM, CITY	PHONE	FIRM ASSETS	LARGEST CLIENT NET WORTH	MEDIAN CLIENT NET WORTH	MINIMUM ASSETS FOR NEW CLIENTS
<b>Louisiana</b>						
Lawrence R. Spinosa, CPA, CFP, ChFC, CLU	Harbor Financial Group, Mandeville	985.674.6722	\$61 million	\$19 million	\$3.4 million	\$0.5 million
<b>Maryland</b>						
Fred Cornelius, CFA, CFP	Burt Associates, Rockville	301.770.9880	\$202 million	\$60 million	\$2.5 million	\$0.5 million
James K. Eichelberger, CFP	Strategic Wealth Management Group, Columbia	410.988.9494	\$335 million	\$43 million	\$3.5 million	\$1 million
Howard M. Weiss, MBA	Bank of America, Baltimore	410.547.4771	\$100 billion+	\$1 billion+	\$125 million	\$25 million
<b>Massachusetts</b>						
William Baldwin, JD, LLM	Pillar Financial Advisors, Waltham	781.693.0111	\$774 million	\$282 million	\$13 million	\$5 million
Alice N. Finn, CFP, JD	Ballentine, Finn & Co., Lincoln	781.259.8126	\$3 billion	\$100 million+	\$50 million	\$10 million
Glenn Frank, CPA, PFS, CFP, MBA	Tanager Financial Services, Waltham	781.893.8040	\$2.3 billion	\$39 million	\$4.7 million	\$1 million
Robert J. Glovsky, JD, LLM, CFP, CLU, ChFC	Mintz Levin Financial Associates, Boston	617.348.1802	\$750 million	\$85 million	\$6 million	\$10 million
Andrew Kryiacou, JD, LLM, CIMA	Ernst & Young, Boston	617.859.6732	\$5 billion	\$850 million	\$13 million	\$2 million
Pran N. Tiku, ChFC, CFP	Peak Financial Management, Wellesley	781.239.0400	\$140 million	\$150 million	\$2.6 million	\$0.5 million
<b>Michigan</b>						
Marilyn Capelli Dimitroff, CFP	Capelli Financial Services, Bloomfield Hills	248.594.9282	\$175 million	\$65 million	\$3.3 million	\$1 million
Charles C. Zhang, CFP, ChFC, CLU	Zhang & Associates, Portage	269.385.1488	\$500 million+	\$50 million	\$3 million	\$0.5 million
<b>Minnesota</b>						
Ross Levin, CFP	Accredited Investors, Edina	952.841.2222	\$350 million	\$35 million	\$8 million	\$1 million
Sharon Olson, CFP	Olson Weiss, Bloomington	952.835.1797	\$120 million	\$80 million	\$3 million	\$0.5 million
Jerry Wade, CFP, CFS	Wade Financial Group, Minneapolis	763.797.9577	\$150 million	\$50 million	\$2.9 million	\$0.5 million
<b>Missouri</b>						
James Blair IV, CFP	Moneta Group, Clayton	314.726.2300	\$4 billion	\$29 million	\$5 million	\$1.5 million
Joan D. Malloy, CPA, CFP, CFA	St. Louis Trust, St. Louis	314.727.4600	\$1.05 billion	\$250 million	\$60 million	\$10 million
<b>New Hampshire</b>						
Roy Ballentine, CFP, ChFC, CLU	Ballentine, Finn & Co., Wolfeboro	603.569.1717	\$3 billion	\$1 billion	\$52 million	\$10 million
<b>New Jersey</b>						
David Bugen, CFP, MBA	RegentAtlantic Capital, Chatham	973.635.7070	\$800 million	\$45 million	\$5.5 million	\$2 million
Christopher Cordaro, CFP, CFA, MBA	RegentAtlantic Capital, Chatham	973.635.7070	\$800 million	\$30 million	\$5 million	\$2 million
<b>New York</b>						
Carol Price Glazer	Morgan Stanley, New York	212.903.7772	\$160 million	\$63 million	\$5 million	\$1 million
Thomas J. Hakala, JD, CPA, PFS	Willmington Trust FSB, New York	212.415.0544	\$33 billion	\$750 million	\$6.5 million	\$2 million
David Hallenbaugh, CPA, MBA, CFP, CIMA	Merrill Lynch Private Banking & Invest., New York	212.236.1601	\$2 billion	\$3.9 billion	\$50 million	\$5 million
Joanne Jensen	Citigroup Private Bank, New York	212.559.5555	\$202 billion	\$3 billion	\$150 million	\$10 million
Benjamin A. Pace III	Deutsche Bank Private Wealth Mgmt., New York	212.454.7815	\$201 billion	\$400 million	\$30 million	\$5 million
Ronald W. Roge, CFP	R.W. Roge & Co., Bohemia	631.218.0077	\$240 million	\$200 million	\$4.5 million	\$1.2 million
Evan Roth, CFA	BBR Partners, New York	212.313.9870	\$1.6 billion	\$200 million	\$40 million	\$10 million
Edward R. Spector, CPA, CIMA	Merrill Lynch, New York	212.236.1660	\$1.2 billion	\$1 billion	\$100 million	\$10 million
Milton Stern, CFA, CFP	Bridgewater Advisors, New York	212.221.5300	\$410 million	\$90 million	\$4 million	\$1 million
<b>North Carolina</b>						
Larry W. Carrol, CFP, CMFC	Carroll Financial Associates, Charlotte	704.553.8006	\$350 million	\$48 million	\$2 million	\$5 million
<b>Ohio</b>						
Michael J. Chasnoff, CFP	Truepoint Capital, Cincinnati	513.792.6648	\$328 million	\$75 million	\$5.5 million	No minimum
Joseph Evelo	Merrill Lynch Private Banking & Invest., Cincinnati	513.579.3888	\$1.1 billion	\$200 million	\$7 million	\$5 million
William D. Heichel, JD, CFP	Pinnacle Wealth Planning Services, Mansfield	800.987.4767	\$210 million	\$250 million	\$15.5 million	\$1.5 million
Jeffrey R. Loehnis, CPA, CFP	Hamilton Capital Management, Columbus	614.273.1000	\$455 million	\$70 million	\$7.5 million	\$0.75 million
Neil Waxman, CFP	Capital Advisors, Cleveland	877.621.0733	\$323 million	\$64 million	\$14 million	\$3 million
<b>Oklahoma</b>						
Joseph Bowie, CFP	Retirement Investment Advisors, Oklahoma City	405.842.3443	\$203 million	\$80 million	\$3 million	\$1 million
<b>Pennsylvania</b>						
Edd H. Hyde, CFP, CIMA	Radnor Financial Advisors, Wayne	610.975.0284	\$454 million	NA	\$5.5 million	\$3 million
David E. Lees, CFA, CPA	Ernst & Young, Philadelphia	215.448.5825	\$1.8 billion	\$1.6 billion	\$27 million	\$2 million
Grant Rawdin, JD, CFP	Wescott Financial Advisory Group, Philadelphia	215.979.1600	\$810 million	\$185 million	\$19.3 million	\$2 million
Louis Stanasolovich, CFP	Legend Financial Advisors, Pittsburgh	888.236.5960	\$202 million	\$22 million	\$1.5 million	\$1 million
<b>Tennessee</b>						
John Ueleke, MBA, CLU, ChFC, CFP	Legacy Wealth Management, Memphis	901.758.9006	\$276 million	\$50 million	\$4.1 million	\$1 million
<b>Texas</b>						
David Diesslin, MBA, CFP	Diesslin & Associates, Fort Worth	817.332.6122	\$362 million	\$33 million	\$4.5 million	No minimum
Mary Durie, CFP	Quest Capital Management, Dallas	214.691.6090	\$387 million	\$23 million	\$3 million	\$1 million
Richard J. Szalc	Neuberger Berman, Dallas	214.880.4720	\$74 billion	\$1 billion	\$20 million	\$1 million
<b>Utah</b>						
John Q. Bird, CFA, CFP, MBA	Albion Financial Group, Salt Lake City	801.487.3700	\$335 million	\$63 million	\$0.7 million	\$2 million
<b>Virginia</b>						
Michael F. Bearer, CPA, PFS, CFP, CIMA	Ernst & Young, McLean	703.747.1615	\$5.5 billion	\$1.2 billion	\$35 million	\$5 million
Patricia P. Houlihan, CFP	Houlihan Financial Resources Group, Reston	703.796.0800	\$60 million	\$15 million	\$6 million	\$1 million
Margaret Miller Welch	SBSB, McLean	410.822.8281	\$1 billion+	\$63 million	\$6 million	\$1 million