

MUNICIPAL ARB HEDGE FUNDS | HOW POOR NATIONS BECOME RICH  
FIRING YOUR FAMILY OFFICE STAFF | THE NEW SHERRY LANSING

# Worth

WEALTH IN PERSPECTIVE

## THE TOP 100 WEALTH ADVISORS

### The Leading Financial Strategists for Braving Volatile Markets

#### Gutted Trusts

HOW RISING RATES  
AFFECT ESTATE PLANNING

#### Greener Pastures

TAX-ADVANTAGED TACTICS  
FOR LAND CONSERVATION

OCTOBER 2006



SIX DOLLARS US \$8.00 CAN



**“UNSUCCESSFUL HEDGE FUNDS disappear only to resurface as  
new funds with a DIFFERENT STRATEGY.”**

wealth preservation. “In light of the fact that non-U.S. markets now represent a majority of the world capital, we believe—and our clients agree—that this broader level of exposure gives us a greater opportunity for growth—not because international returns have been better recently (which they have) but because it is an improved exposure to

the world’s growth,” says Norman Boone, of Mosaic Financial Partners in San Francisco. Downward pressure on the dollar from the current account deficit and rising interest rates abroad add a measure of urgency to the need to diversify internationally. Most of our Top 100 recommend that clients allocate at least 10 percent of their portfolios to

	FIRM, CITY	PHONE	FIRM ASSETS	LARGEST CLIENT'S NET WORTH	MEDIAN CLIENT NET WORTH	MINIMUM ASSETS FOR NEW CLIENT
Linda Lubitz, CFP	Lubitz Financial Group, Miami	305.670.4440	\$129 million	\$280 million	\$5.5 million	\$1 million
William Neubauer, MBA, CFP	Comprehensive Money Mgmt. Services, Coral Gables	305.662.7757	\$20 million	\$10 million	\$2.5 million	No minimum
Thomas H. Ruggie, CFP, ChFC, CLU	Ruggie Wealth Management, Tavares	352.343.2700	\$193 million	\$110 million	\$2.25 million	\$1 million
Marc Singer, MBA, CFP	Singer Xenos Wealth Management, Coral Gables	305.443.0060	\$800 million	\$130 million	\$4.6 million	\$1 million
<b>Georgia</b>						
Anthony Guinta, CPA, CFP, PFS	Homrich & Berg, Atlanta	404.264.1400	\$1.3 billion	\$1 billion	\$6 million	\$2.5 million
Ron Hughes Jr., MBA, CFM	Merrill Lynch, Atlanta	404.231.2558	\$1.8 trillion	\$250 million	\$20 million	\$10 million
Bernard Palmer, CPA, CIMA	PricewaterhouseCoopers, Atlanta	678.419.7335	\$2.2 billion	\$400 million	\$25 million	\$1 million
<b>Hawaii</b>						
Harry G. Kasanow, CFP	Kasanow & Associates, Honolulu	808.988.1311	\$61.5 million	\$20 million	\$3.5 million	\$1 million
<b>Illinois</b>						
Brent Brodeski, MBA, CPA, CFP, CFA	Savant Capital Management, Rockford	815.227.0300	\$1.1 billion	\$49 million	\$2.2 million	\$1 million
Michael L. Peska, CFP	JPMorgan, Wheaton	630.221.2245	\$1.2 trillion	\$1 billion	\$12.5 million	\$1 million
Lynn A. Varndell	JPMorgan, Chicago	312.732.7084	\$1.2 trillion	\$500 million	\$15 million	\$1 million
Steven Weinstein, JD, MBA, CFP, CFA	Altair Advisers, Chicago	312.429.3013	\$2.1 billion	\$1 billion	\$11 million	\$5 million
Robert A. Westrick, MBA, CPA, CFP	WNA Investment Programs, Hinsdale	630.455.0600	\$122 million	\$40 million	\$2 million	\$0.5 million
<b>Indiana</b>						
Jeffrey Thomasson, CFP	Oxford Financial Group, Indianapolis	317.805.5000	\$14 billion	\$1 billion	\$75 million	\$5 million
<b>Kansas</b>						
Peter Mallouk, JD, MBA, CFP	Creative Planning Private Wealth Mgmt., Overland Park	913.338.2727	\$344 million	\$143 million	\$2.7 million	No minimum
<b>Louisiana</b>						
Lawrence Spinosa, CPA, CFP, ChFC, CLU	Spinosa Noguees Financial Advisors, Mandeville	985.674.6722	\$92 billion	\$24 million	\$3.9 million	\$0.5 million
<b>Maryland</b>						
Fred Cornelius, CFP, CFA	Burt Associates, Rockville	301.770.9880	\$273 million	\$83 million	\$2.5 million	\$1 million
Howard Weiss, MBA	Bank of America, Baltimore	410.547.4771	\$1.3 trillion	\$275 million	\$150 million	\$25 million
<b>Massachusetts</b>						
William Baldwin	Pillar Financial Advisors, Waltham	781.290.4900	\$737 million	\$130 million	\$10 million	\$5 million
Alice Finn, JD, CFP	Ballentine Finn & Co., Waltham	781.314.1310	\$4 billion	\$150 million	\$60 million	\$10 million
Glenn Frank, MBA, CPA, CFP, PFS	Wachovia, Waltham	781.893.8040	\$704 billion	\$51 million	\$6.4 million	\$4 million
Andrew Kyriacou, JD, CIMA	Wealth and Tax Advisory Services, Boston	617.292.8402	\$4 billion	\$650 million	\$13 million	\$2 million
Pran N. Tiku, CFP, ChFC	Peak Financial Management, Waltham	781.487.9500	\$200 million	\$150 million	\$2.8 million	\$0.5 million
<b>Michigan</b>						
Marilyn Capelli Dimitroff, CFP	Capelli Financial Services, Bloomfield Hills	248.594.9282	\$243 million	\$65 million	\$4 million	\$1 million