

Robb Report Worth

WEALTH IN PERSPECTIVE

THE NATION'S

100

MOST EXCLUSIVE

WEALTH

ADVISORS

JANUARY 2004



SIX DOLLARS U.S. \$8.00 CDN

CURTCO PUBLISHING, LLC

MAJOR LEAGUE LEGACY
THE ARIZONA DIAMONDBACKS' OWNER
SCORES AN EMOTIONAL ROI

FRACTURED FAMILIES
A LOOK AT THREE 100-YEAR PLANS GONE WRONG

100 Top Financial Advisors

	FIRM, CITY	PHONE	FIRM ASSETS	LARGEST CLIENT NET WORTH	MEDIAN CLIENT NET WORTH WITH REAL ESTATE	MEAN CLIENT NET WORTH WITH REAL ESTATE
Alabama						
Robert Studin, CFP, CPA, PFS, ChFC, JD*	First Financial Group, Birmingham	205.803.3333	\$1 billion	\$120 million	\$3.5 million	\$6 million
Arizona						
Laurie Bagley, CFA	Strategic Wealth Advisors, Scottsdale	480.998.1798	\$57.5 million	\$10 million	\$2 million	\$9.5 million
Thomas J. Connelly	Keats, Connelly and Associates, Phoenix	602.955.5007	\$179.3 million	\$40 million	\$750,000	\$1.42 million
Arkansas						
Cynthia Conger, CFP, CPA, PFS	The Arkansas Financial Group, Little Rock	501.376.9051	\$110.6 million	\$13 million	\$1.5 million	\$1.06 million
Lawrence Waschka	Waschka Capital Investments, Little Rock	501.664.8036	\$100 million	\$50 million	\$1.15 million	\$2 million
California						
James Berliner, JD	Westmount Asset Management, Los Angeles	310.556.2502	\$325 million	\$50 million	\$2.5 million	\$2.75 million
Norman Boone, CFP, MBA	Boone Financial Advisors, San Francisco	415.788.1952	\$170 million	\$60 million	\$2 million	\$3.5 million
Michael Glowacki, CFP, CPA	The Glowacki Group, Los Angeles	310.473.0100	\$73 million	\$30 million	\$5 million	\$5.4 million
Meloni Hallock, CPA, PFS, MBA	Ernst & Young, Los Angeles	213.977.3596	\$6 billion	\$1 billion	\$60 million	\$230 million
Rich Hogan, CPA, MBA	Merrill Lynch (team name HBW Advisors), San Francisco	415.288.2504	\$2.4 billion	\$2.2 billion	\$57 million	\$150 million
Debbie Jorgensen, CFP*	Merrill Lynch, San Francisco	415.955.3782	\$425 million	\$93 million	\$13 million	\$20 million
Timothy Kochis, CFP, JD, MBA	Kochis Fitz, San Francisco	415.394.6670	\$965 million	\$160 million	\$10 million	\$13 million
Jeff Saccacio, CPA, PFS, ChFC	Harris myCFO, Irvine	949.453.3807	\$3.47 billion	\$106 million	\$13.5 million	\$31 million
Laura Tarbox, CFP	Tarbox Equity, Newport Beach	800.482.7269	\$260 million	\$80 million	\$2.7 million	\$5.5 million
Debra L. Wetherby, CFP, CPA, CFA	Wetherby Asset Management, San Francisco	415.399.9159	\$750 million	\$150 million	\$11 million	\$22 million
Christopher Wheaton, CFP, CPA	Litman/Gregory and Co., Larkspur	415.461.8999	\$2.67 billion	\$606 million	\$6.5 million	\$9 million
Colorado						
Joseph Janiczek, ChFC	Janiczek & Co., Greenwood Village	303.721.7000	\$160 million	\$25 million	\$3 million	\$2.5 million
Diane Padalino	JP Morgan Private Bank, Denver	303.607.7705	\$259 million	\$1.2 billion	\$55 million	\$65 million
Myra Salzer, CFP	The Wealth Conservancy, Boulder	303.444.1919	\$375 million	\$200 million	\$18 million	\$8 million
Judith Shine, CFP	Shine Investment Advisory Services, Greenwood Village	303.740.8600	\$300 million	\$60 million	\$2.3 million	\$5.3 million
Thomas Zanecchia, CPA	Wealth Management Consultants, Denver	303.292.9224	\$249 million	\$750 million	\$19.2 million	\$31.8 million
Connecticut						
John Erdmann, +	Merrill Lynch Private Client Group, Greenwich	800.256.3987	\$1.5 billion	\$250 million	\$15 million	\$20 million
Delaware						
Judith Lau, CFP	LauOlmstead, Wilmington	302.792.5955	\$350 million	\$200+ million	\$9.95 million	Not available
District of Columbia						
Alexandra Armstrong, CFP&	Armstrong, MacIntyre & Severns, Washington	202.887.8135	\$697.5 million	\$22 million	\$1.8 million	\$1.6 million
Florida						
Harold Evensky, CFP	Evensky Group, Coral Gables	305.448.8882	\$400 million	\$35 million	\$6 million	\$5 million
Robert Levitt, CFP, CFA, MBA	Levitt Capital Management, Boca Raton	561.893.9901	\$100-200 million	\$70 million	\$5+ million	\$5+ million
Diane L. McLaughlin, CFP+	Wachovia Wealth Management, Palm Beach	561.820.1082	\$62.5 billion	\$700 million	\$30 million	\$74 million
John Prizer, CFP, CFA	Resource Consulting Group, Orlando	407.422.0252	\$510 million	\$60 million	\$2.5 million	\$4 million
Ronald Rutherford, CFP, MBA	Rutherford Asset Planning, Naples	239.261.3344	\$56 million	\$130 million	\$1.6 million	\$5.3 million
Jay Shein, CFP, CIMA, PhD&	Compass Financial Group, Lighthouse Pt.	954.946.8501	\$137 million	\$40 million	\$2.65 million	\$3.75 million
Marc Singer, CFP	Singer Xenos Wealth Management, Coral Gables	305.443.0060	\$400 million	\$40 million	\$3.3 million	\$4.1 million
Gregory F. Wilder, CPA, JD	Grant Thornton Accounting Firm, Orlando	407.481.5113	n/a	\$1.5 billion	\$30 million	\$180 million
Georgia						
Franklin H. Butterfield, CFP, CPA, PFS, CFA	Homrich & Berg, Atlanta	404.264.1400	\$725 million	\$125 million	\$4 million	\$7.5 million
Perry Chesney, CFP, CLU, ChFC+	Merrill Lynch Wealth Management, Atlanta	770.390.7364	\$350 million	\$100 million	\$5 million	\$12 million
Chris Dardaman, CFP, CPA, PFS, CIMA	Polstra & Dardaman, Norcross	770.368.1700	\$300 million	\$80 million	\$3 million	\$5.8 million
Robert (Buzz) Law, CFP	Creative Financial Group, Atlanta	800.435.8526	\$606 million	\$95.5 million	\$3.3 million	\$8.9 million
Illinois						
Mark Balasa, CFP, CPA	Balasa Dinverno Foltz & Hoffman, Schaumburg	847.925.9400	\$610 million	\$28 million	\$6 million	\$4.2 million
Brent Brodeski, CFP, CPA, CFA, MBA	Savant Capital Management, Rockford	815.227.0300	\$469 million	\$34 million	\$1.2 million	\$1.5 million
Harvey Struthers	JP Morgan Private Bank, Chicago	312.541.3610	\$259 billion	\$400 million	\$125+ million	\$600 million
Bruce Weininger, CFP, CPA	Deloitte & Touche, Chicago	312.242.9986	\$250 million	\$2 billion	\$14.5 million	\$52 million
Steven B. Weinstein, CFP, CFA, JD, MBA	Altair Advisers, Chicago	312.429.3013	\$640 million	\$1 billion+	\$10 million	\$21 million
Indiana						
Elaine Bedel, CFP, MBA	Bedel Financial Consulting, Indianapolis	317.843.1358	\$200 million	\$100 million	\$1.8 million	\$2.5 million
Robin Hall, CFP, JD	STAR Wealth Management, Indianapolis	317.566.3100	\$415 million	\$40 million	\$5 million	\$6 million
Iowa						
Chad P. Tramp, CFP, CPA	RSM McGladrey, Des Moines	515.281.9262	\$1 billion+	\$40 million	\$2.4 million	\$4.6 million
Maryland						
Howard Weiss, ++	Bank of America, Baltimore	410.547.4771	\$95 billion	\$110 million	\$98 million	\$72 million
Massachusetts						
Beverly A. Buker, CFP	Citigroup Private Bank, Boston	617.330.8909	\$800 million	Not available	\$100 million	\$500 million
Cynthia Delia Coddington, CFP, CPA, PFS	Coddington Financial Partners, Wellesley	781.431.8702	Not available	Not available	\$12.5 million	\$24 million
Alice Finn, CFP, JD	Ballentine, Finn & Co., Lincoln	781.259.8126	\$2.5 billion	\$200+ million	\$30 million	\$60 million
Glenn Frank, CFP, CPA, PFS, MBA	Tanager Financial Services, Waltham	781.893.8040	\$2.1 billion	\$437 million	\$4.9 million	\$6.1 million
Beth Gamel, CPA, PFS, MBA	Pillar Financial Advisors, Waltham	781.290.4900	\$727 million	\$135 million	\$12.7 million	\$24.2 million
Robert Glovsky, CFP, CLU, JD	Mintz Levin Financial Advisors, Boston	617.348.1802	\$750 million	\$80 million	\$4 million	\$7 million

NOTE ABOUT FEE STRUCTURE: FEE ONLY UNLESS OTHERWISE INDICATED KEY:
+ fee or commission; * fee and commission; ++ fee offset; & fee only for new clients;

CFP: Certified Financial Planner; CPA: Certified Public Accountant; PFS: Personal Financial Specialist;
CFA: Chartered Financial Analyst; CIMA: Certified Investment Management Analyst; ChFC: Chartered Financial Consultant
CLU: Chartered Life Underwriter; JD: Doctor of Law; MBA: Master of Business Administration; PhD: doctorate