

Barron's: Top 100 Independent Wealth Advisors

Here are America's top independent financial advisors, as identified by Barron's. The ranking reflects the volume of assets overseen by the advisors and their teams, revenues generated for the firms and the quality of the advisors' practices. The scoring system assigns a top score of 100 and rates the rest by comparing them with the winner. A ranking of "N" denotes an advisor who is new to the list.

Rank	'16	'15	Name	Firm	Location	CUSTOMERS					Total Asset (\$mil)	Typical Account (\$mil)	Typical Net Worth (\$mil)	Score
						Individuals (Up to \$1mil)	High Net Worth (\$1-10 mil)	Ultra-High Net Worth (\$10 mil+)	Foundations	Endowments				
1	2		Fred Fern	Churchill Management Group	Los Angeles, Calif.	■	■	■		■	3953	0.8	3	100
2	5		Ron Carson	Carson Wealth Management Group	Omaha, Neb.	■	■	■			7440	5	10	100
3	4		Spuds Powell	Kayne Anderson Rudnick Investment Management	Los Angeles, Calif.		■	■	■	■	10535	7	15	100
4	7		Robert A. Clarfeld	Clarfeld Financial Advisors	Tarrytown, N.Y.		■	■	■		6593	20	80	99.8
5	10		Richard Saperstein	HighTower	New York, N.Y.		■	■	■		10481	15	40	99.5
6	9		Charles Zhang	Zhang Financial	Portage, Mich.	■	■	■	■		2495	2	3	99.3
7	11		Edward (Ted) Cronin	Manchester Capital Management	Montecito, Calif.		■	■	■		3149	25	60	99.3
8	23		Michael Nathanson	The Colony Group	Boston, Mass.	■	■	■			5081	3	8	99
9	8		Greg Miller	Wellesley Asset Management	Wellesley, Mass.	■	■	■		■	2361	2	5	99
10	12		David Lees	myCIO Wealth Partners	Philadelphia, Pa.		■	■			8484	27	33.5	98.7
11	3		Jon Goldstein	First Republic Investment Management	Menlo Park, Calif.			■			6510	50	100	98
12	14		Gregg Fisher	Gerstein Fisher	New York, N.Y.	■	■	■	■	■	3267	1.5	7.5	98
13	17		Edward Neild	Gresham Partners	Chicago, Ill.			■			5449	53	60	98
14	22		Michael Yoshikami	Destination Wealth Management	Walnut Creek, Calif.	■	■	■			1700	2	8	97.1
15	31		Stephan Cassaday	Cassaday and Company	McLean, Va.	■	■	■			1806	1.5	2	96.6
16	13		Shannon Eusey	Beacon Pointe Advisors	Newport Beach, Calif.	■	■	■	■	■	7481	8	15	96.2
17	21		David Kudla	Mainstay Capital Management	Grand Blanc, Mich.	■	■	■		■	2006	0.5	4	96.1
18	16		Grant Rawdin	Wescott Financial Advisory Group	Philadelphia, Pa.	■	■	■	■	■	2330	6.2	21.5	96
19	19		Paul Tramontano	First Republic Investment Management	New York, N.Y.		■	■			6510	25	50	95.6
20	29		Valerie Newell	RiverPoint Capital Management	Cincinnati, Ohio	■	■	■			2218	4	8	95.6
21	N		Kimberlee Orth	Ameriprise Financial	Wilmington, Del.	■	■	■			1539	4	10.5	95.2
22	24		Joshua Gross	Mill Creek Capital Advisors	Conshohocken, Pa.		■	■	■	■	4824	14	25	95
23	N		Alan Zafran	First Republic	Menlo Park,		■	■	■	■	12850	40	100	94.9

			Investment Management	Calif.									
24	15	Robert J. Skinner II	First Republic Investment Management	Menlo Park, Calif.	■	■	■			12850	50	100	94.7
25	35	Susan Kaplan	Kaplan Financial Services	Newton, Mass.	■	■				1600	3.8	10	93.9
26	37	Lori Van Dusen	LVW Advisors	Pittsford, N.Y.	■	■	■	■	■	4521	50	75	93.8
27	26	Steven Weinstein	Altair Advisers	Chicago, Illinois	■	■				3747	13	25	93.6
28	39	Jeffrey Colin	Baker Street Advisors	San Francisco, Calif.	■	■	■			6150	20	30	93.5
29	50	Leo Kelly	HighTower	Hunt Valley, Md.	■	■		■	■	1909	5	15	93.4
30	40	Erik Morgan	Freestone Capital Management	Seattle, Wash.	■	■	■			3480	2.7	7	93.4
31	32	Timothy Grimes	Grimes & Company	Westborough, Mass.	■	■	■			2012	3.5	7	93
32	49	Lon Morton	Morton Capital Management	Calabasas, Calif.	■	■	■		■	1602	2.7	8	93
33	25	Laila Pence	Pence Wealth Management	Newport Beach, Calif.	■	■	■			1542	2	5	92.9
34	34	Dale Yahnke	Dowling & Yahnke	San Diego, Calif.	■	■	■			3223	3	20	92.7
35	41	Randall Linde	Ameriprise Financial	Renton, Wash.	■	■	■			1776	0.8	1.5	92.2
36	18	Kenneth Moraif	Money Matters with Ken Moraif	Plano, Texas	■	■				3245	0.5	1	92.1
37	27	Gary Ran	Telemus Capital Partners	Southfield, Mich.	■	■	■			2010	3.9	18	92
38	43	Mark Orgel	Orgel Wealth Management	Altoona, Wis.	■	■	■		■	3772	2.5	5	92
39	42	Kevin Timmerman	Steele Capital Management	Dubuque, Iowa	■	■			■	1624	0.7	3	91.7
40	45	Robert Balentine	Balentine	Atlanta, Ga.	■	■		■	■	2373	16	25	91.7
41	44	James B. Stack	Stack Financial Management	Whitefish, Mont.	■	■	■			1125	1.5	5	91.3
42	56	David Wright	The Sierra Investment Management	Santa Monica, Calif.	■	■	■		■	1661	2	3	91.1
43	60	Michael Chasnoff	Truepoint Wealth Counsel	Cincinnati, Ohio	■	■	■			2168	5	8	90.6
44	53	Gerard Klingman	Klingman & Assocs.	New York, N.Y.	■	■				1706	10	15	90.6
45	57	Robert Fragasso	Fragasso Financial Advisors	Pittsburgh, Pa.	■	■	■		■	1117	0.9	1.7	90.2
46	30	Jonathan Kuttin	Ameriprise Financial	Melville, N.Y.	■	■	■			1405	1	3.9	90.1
47	73	John Henry	OBS Financial Services	Whitehouse, Ohio	■				■	2132	0.5	1	90.1
48	64	Brian Holmes	Signature Estate & Investment Advisors	Los Angeles, Calif.	■	■	■		■	5490	8	21	90.1
49	N	John M. Krambeer	Camden Capital	El Segundo, Calif.	■	■	■			1621	15	30	86
50	N	Alex Shahidi	Advanced Research Investment Solutions	Beverly Hills, Calif.	■	■	■		■	10198	20	25	85.9
51	N	Roger Wade	GW & Wade	Wellesley, Mass.	■	■	■			5341	0.7	2.4	85.8
52	47	Clarke Lemons	WaterOak Advisors	Winter Park, Fla.	■	■	■	■		1493	3	5	85.6
			Adviser		■	■							

53	69	Daniel Wiener	Investments	Newton, Mass.				3343	0.5	1.2	85.6
54	59	Lewis Altfest	Altfest Personal Wealth Management	New York, N.Y.	■	■	■	1127	2	4	85.4
55	38	John Waldron	Waldron Private Wealth	Pittsburgh, Pa.		■	■	1324	10	25	85.4
56	46	Daniel Roe	Budros Ruhlin & Roe	COLUMBUS, Ohio	■	■	■	2192	3.5	4.5	85.3
57	51	William Rice	Anchor Capital Advisors	Boston, Mass.			■	8315	2	5	85.3
58	81	Erin Scannell	Ameriprise Financial	Mercer Island, Wash.	■	■	■	1724	1.5	5	85.2
59	N	Jordan Waxman	HighTower	New York, N.Y.		■	■	2000	25	50	85.2
60	70	Chuck Bean	Heritage Financial Services	Westwood, Mass.	■	■	■	1039	2	3	85
61	87	Charles Brighton	Brighton Jones	Seattle, Wash.	■	■	■	3321	3	4	84.7
62	89	Jon Jones	Brighton Jones	Seattle, Wash.	■	■	■	3321	3	4	84.7
63	75	Pamela Rosenau	HighTower	Los Angeles, Calif.	■	■	■	1023	7	25	84.7
64	52	Jim Berliner	Westmount Asset Management	Los Angeles, Calif.	■	■	■	2393	2.8	8	84.7
65	N	Charles Simmons	Ameriprise Financial	Metairie, La.	■	■	■	1734	0.8	1.8	84.7
66	82	Scott Tiras	Ameriprise Financial	Houston, Texas	■	■	■	2264	2	3.5	84.6
67	77	Lawrence Hood	Pacific Portfolio Consulting	Seattle, Wash.	■	■	■	2828	11	18.3	84.5
68	71	William Cafero	RCL Advisors	New York, N.Y.	■	■	■	1562	16.5	54	84.5
69	88	Richard S. Brown	JNBA Financial Advisors	Minneapolis, Minn.	■	■	■	1173	1.5	2	84.5
70	95	Rick Buoncore	MAI Capital Management	Cleveland, Ohio	■	■	■	3865	10	25	84.4
71	90	Randy Carver	Raymond James	Mentor, Ohio	■	■	■	1030	1	1.6	84.3
72	N	Randolph (Randy) Peterson	First Republic Investment Management	San Francisco, Calif.	■	■	■	3262	1.3	15	84.3
73	74	Kevin Myeroff	NCA Financial Planners	Cleveland, Ohio	■	■	■	1311	1.5	3	84.3
74	84	Malcolm Makin	Raymond James	Westerly, R.I.	■	■	■	1069	1.5	3	84.3
75	N	Shawn Parker	Ameriprise Financial	Schaumburg, Ill.	■	■	■	1400	1.5	3.5	84.2
76	83	Jeffrey Grinspoon	HighTower	Vienna, Va.		■	■	1180	4	7	83.9
77	86	Frank Marzano	GM Advisory Group	Melville, N.Y.		■	■	1087	8	30	83.9
78	80	Wally Obermeyer	Obermeyer Wood Investment Counsel	Aspen, Colo.	■	■	■	1500	3	10	83.8
79	N	Jeffrey Zlot	The Presidio Group	San Francisco, Calif.		■	■	3930	28	50	83.8
80	N	Debra Wetherby	Wetherby Asset Management	San Francisco, Calif.		■	■	4132	10	15	83.8
81	85	Matthew Young	Richard C. Young & Co.	Newport, R.I.	■	■	■	969	1.8	5	83.7
82	79	John Lesser	Plante Moran Financial Advisors	Auburn Hills, Mich.		■	■	11888	26.5	91	83.6
83	N	Frank Reilly	Reilly Financial Advisors	La Mesa, Calif.	■	■	■	1193	1	4.5	83.5

84	100	Andy Berg	Homrich Berg	Atlanta, Ga.	▪	▪		4230	3	7	83.5
85	93	George Papadoyannis	Ameriprise Financial	San Mateo, Calif.	▪	▪	▪	4400	2	7.5	83.5
86	96	Scott George	Mason Investment Advisory Services	Reston, Va.			▪	5536	42	100	83.5
87	76	Van Percy	Raymond James	Midland, Texas	▪	▪	▪	1420	3	10	83.5
88	N	Paul C. Carbetta II	Ameriprise Financial	Worthington, Ohio	▪	▪		1718	0.4	1.3	83.5
89	62	James Meredith	Hefren-Tillotson	Pittsburgh, Pa.	▪	▪	▪	1457	1.2	3.9	83.4
90	91	Shari Burns	United Capital Seattle	Seattle, Wash.		▪	▪	1500	5.7	8	83.4
91	72	Kevin VanDyke	Bloomfield Hills Financial	Bloomfield Hills, Mich.	▪	▪	▪	840	2	4	83.3
92	N	Joseph Jacques	Jacques Financial	Rockville, Md.	▪	▪	▪	676	0.8	1.2	83.2
93	N	Jerry Deren	The Presidio Group	Dallas, Texas		▪	▪	3930	28	50	83.2
94	92	Thomas Myers	Brownson, Rehms & Foxworth	Menlo Park, Calif.		▪	▪	9990	25	40	83
95	N	Glenn Degenaaars	First Republic Investment Management	New York, N.Y.		▪	▪	7422	1.5	3	83
96	94	Andrew Rand	Rand & Associates	San Francisco, Calif.	▪	▪	▪	979	3	5	82.9
97	97	Patrick McClain	Hanson McClain Advisors	Sacramento, Calif.	▪	▪		2023	0.5	1	82.7
98	98	Scott T. Hanson	Hanson McClain Advisors	Sacramento, Calif.	▪	▪		2023	0.5	1	82.7
99	N	Erin Botsford	Botsford Financial Group	Frisco, Texas	▪	▪	▪	871	5	10	82.7
100	N	Greg Sullivan	Sullivan, Bruyette, Speros & Blayney	McLean, Va.		▪	▪	2950	5	10	82.7

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