

# WORKING MOTHER TOP WEALTH ADVISOR MOMS 2019

and SHOOK Research's

RANK	NAME	FIRM	CITY	STATE	TEAM CUSTODIED ASSETS*	TYPICAL NET WORTH OF RELATIONSHIPS	TYPICAL SIZE OF HOUSEHOLDS	MINIMUM ACCOUNT SIZE OF NEW BUSINESS**
1	Elaine Meyers	JP Morgan Securities	San Francisco	CA	\$3.1B	\$20M-2B	\$10M-1.2B	\$10M
2	Cheryl Young	Morgan Stanley Wealth Management	Los Gatos	CA	\$941M	\$10M-35M	\$2M-10M	\$2M
3	Laila Pence	Pence Wealth Management/LPL Financial	Newport Beach	CA	\$1.6B	\$2M	\$500K-11.5M	\$2M
4	Christina Boyd	Merrill Lynch Wealth Management	Wayzata	MN	\$995M	\$5M-50M	\$3M-30M	\$3M
5	Emily Rubin	UBS Financial Services	New York	NY	\$1.2B	\$5M-30M	\$5M-20M	\$5M
6	Teresa Jacobsen	UBS Private Wealth Management	Stamford	CT	\$862M	\$10.5M-40M	\$5M-45M	\$2.5M
7	Linnell Sullivan	Merrill Lynch Wealth Management	Cincinnati	OH	\$1.3B	\$5M-20M	\$4M-15M	\$2.5M
8	Jennifer Ellison	B O S	Redwood City	CA	\$4.4B	\$5M-25M	\$3M-80M	\$3M
9	Sonia Attkiss	UBS Private Wealth Management	New York	NY	\$633M	\$25M-50M	\$15M-25M	\$2M
10	Gillian Yu	Morgan Stanley Private Wealth Management	San Francisco	CA	\$5.8B	\$50M-100M	\$20M-50M	\$10M
11	Marcie Behman	Merrill Private Wealth Management	Boston	MA	\$1.5B	\$15M-70M	\$15M-95M	\$4M
12	Ali Phillips	Obermeyer Wood Investment Counsel	Aspen	CO	\$1.5B	\$5M-20M	\$3M-10M	\$1M
13	Diane Compardo	Moneta	St. Louis	MO	\$1.4B	\$10M-30M	\$5M-20M	\$5M
14	Maureen Raihle	Merrill Private Wealth Management	Chicago	IL	\$1.7B	\$20M-40M	\$10M-20M	\$2.5M
15	Darlene Murphy	Wellesley Asset Management	Wellesley	MA	\$2.4B	\$1M-25M	\$2M-10M	\$500K
16	Carlette McMullan	William Blair & Co.	Chicago	IL	\$682M	\$4M-10M	\$1M-3M	\$500K
17	Inna Kelly	Morgan Stanley Wealth Management	San Francisco	CA	\$1.1B	\$10M-70M	\$5M-30M	\$10M
18	Gwen Campbell	Merrill Private Wealth Management	San Francisco	CA	\$1.1B	\$1M-25M	\$1M-325M	\$10M
19	Jessica Guo	UBS Financial Services	Wellesley	MA	\$406M	\$2M-50M	\$1M-20M	\$1M
20	Nazie Saffari Moini	Merrill Lynch Wealth Management	Beverly Hills	CA	\$602M	\$2M-8M	\$500K-5M	\$500K
21	Linda Modico	UBS Financial Services	New York	NY	\$1.5B	\$50M-800M	\$5M-600M	\$15M
22	Anouchka Balog	Morgan Stanley Wealth Management	Laguna Niguel	CA	\$637M	\$3M-25M	\$1M-20M	\$1M
23	Faith Xenos	Singer Xenos Schechter Sosler Wealth Management	Coral Gables	FL	\$725M	\$4M-11M	\$2M-10M	\$1M
24	Thais Piotrowski	Ameriprise Financial Services	Boca Raton	FL	\$348M	\$3M-5M	\$802K-6M	\$500K
25	Danielle Prunier	Merrill Lynch Wealth Management	Century City	CA	\$971M	\$15M-20M	\$5M-20M	\$0
26	Aimee Cogan	Morgan Stanley Wealth Management	Sarasota	FL	\$945M	\$20M-50M	\$15M-25M	\$1M
27	Kathleen Youngerman	Morgan Stanley Private Wealth Management	Chesterfield	MO	\$309M	\$10M-100M	\$5M-40M	\$2M
28	Diane Hart	UBS Financial Services	Pasadena	CA	\$1.6B	\$5M-40M	\$1M-5M	\$1M
29	Rebecca Lerner	Merrill Lynch Wealth Management	New York	NY	\$784M	\$4M-15M	\$2M-10M	\$1M
30	Wendy Holmes	UBS Financial Services	New York	NY	\$1.2B	\$15M-250M	\$4M-50M	\$10M
31	Emily Bach	Morgan Stanley Wealth Management	Orinda	CA	\$1B	\$4M-10M	\$3M-7M	\$1M
32	Alyssa Moeder	Merrill Private Wealth Management	New York	NY	\$5.2B	\$25M	\$25M	\$10M

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33	Jennifer Garcia	Wells Fargo Advisors	Encino	CA	\$978M	\$10M-100M	\$7M-100M	\$2.5M
34	Rachel Gottlieb	UBS Financial Services	New York	NY	\$889M	\$10M	\$2M-50M	\$1M
35	Michelle Mayer	Merrill Private Wealth Management	Naples	FL	\$797M	\$8M-50M	\$10M-50M	\$5M
36	Betsy Pakenas	Morgan Stanley Wealth Management	Frederick	MD	\$782M	\$4M-70M	\$2M-5M	\$1M
37	Beth Scanlan	Morgan Stanley Wealth Management	San Francisco	CA	\$401M	\$5M-25M	\$3M-15M	\$2M
38	Rachel Barzilay	Merrill Lynch Wealth Management	Boca Raton	FL	\$884M	\$5M-20M	\$3M-15M	\$3M
39	Ronya Corey	Merrill Lynch Wealth Management	Washington	DC	\$730M	\$2M-20M	\$5M-20M	\$2M
40	Anukka Mikkola	Merrill Lynch Wealth Management	Bellevue	WA	\$673M	\$1.5M-10M	\$1M-3.5M	\$750K
41	Lisa A. Petrie	Wells Fargo Advisors	Long Beach	CA	\$239M	\$2M-15M	\$1.5M-10M	\$500K
42	Cindy Katz Morton	Morgan Stanley Wealth Management	Boca Raton	FL	\$565M	\$5M-10M	\$1M-5M	\$1M
43	Maria Colucci	Merrill Lynch Wealth Management	New York	NY	\$762M	\$10M	\$3M-10M	\$1M
44	Rhonda Finby	Wells Fargo Advisors	Long Beach	CA	\$385M	\$2M-10M	\$1M-5M	\$1M
45	Liz Weikes	JP Morgan Securities	New York	NY	\$3.3B	\$10M-75M	\$2M-10M	\$2M
46	Christy Covalesky	Wetherby Asset Management	San Francisco	CA	\$5B	\$30M-60M	\$20M-40M	\$10M
47	Katie Larsen	Merrill Lynch Wealth Management	Sewickley	PA	\$538M	\$3.5M-8M	\$1.5M-5M	\$1M
48	Anna Winderbaum	Morgan Stanley Private Wealth Management	New York	NY	\$1.7B	\$40M-50M	\$25M-30M	\$2M
49	Kristina Van Liew	Morgan Stanley Graystone	Chicago	IL	\$4.2B	\$10M-100M	\$10M-150M	\$10M
50	Sherry Verbugt	UBS Financial Services	Houston	TX	\$865M	\$1M-3M	\$500K-2.5M	\$1M
51	Mitzi Michaelson	Merrill Lynch Wealth Management	Brentwood	TN	\$406M	\$3M-10M	\$1M-6M	\$250K
52	Kimberly Hunter	Wells Fargo Advisors	Santa Rosa	CA	\$590M	\$10M-30M	\$3M-20M	\$1M
53	Elizabeth Miller	Merrill Lynch Wealth Management	Peoria	IL	\$1.3B	\$250K-30M	\$100K-29M	\$250K
54	Jennifer Hartmann	Morgan Stanley Wealth Management	New York	NY	\$1.5B	\$1.5M-7M	\$1M-5M	\$500K
55	Michele B. O'Connor	Morgan Stanley Wealth Management	Boston	MA	\$238M	\$1.8M-4M	\$800K-14M	\$750K
56	Nina Abelman	Merrill Lynch Wealth Management	Bellevue	WA	\$460M	\$5M-25M	\$3M-25M	\$3M
57	Judith Lu	Miracle Mile Advisors	Los Angeles	CA	\$1.3B	\$10M-50M	\$5M-15M	\$1M
58	Ylisa Sanford	Ameriprise Financial Services	Santa Rosa	CA	\$525M	\$2M-25M	\$450K-10M	\$450K
59	Corina Davis	Merrill Lynch Wealth Management	Seattle	WA	\$621M	\$2M-5M	\$1M-4M	\$1M
60	Stacy Francis	Francis Financial	New York	NY	\$270M	\$3M-5M	\$700K-8M	\$1M
61	Hanane Lemlih	Wells Fargo Advisors	McLean	VA	\$1.2B	\$8M-75M	\$2.5M-20M	\$2M
62	Natalea Simmons	Merrill Lynch Wealth Management	St. Louis	MO	\$326M	\$3M-50M	\$1M-15M	\$1M
63	Xi Qiao	UBS Financial Services	San Francisco	CA	\$793M	\$2M-200M	\$2M-10M	\$2M
64	Sara Wohl	Merrill Lynch Wealth Management	Ann Arbor	MI	\$383M	\$1M-10M	\$1M-8M	\$500K

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65	Mara Bralove	Morgan Stanley Wealth Management	Bethesda	MD	\$490M	\$1.5M-10M	\$1M-8M	\$1M
66	Diane Padalino	Merrill Private Wealth Management	Denver	CO	\$1.4B	\$10M-50M	\$30M-100M	\$10M
67	Emily Hill	Morgan Stanley Wealth Management	Lawrence	KS	\$414M	\$2M-20M	\$2.6M-15M	\$2M
68	Kalyn Walker	UBS Financial Services	San Diego	CA	\$921M	\$2M-10M	\$1M-5.5M	\$1M
69	Janet Franco Gordon	Morgan Stanley Wealth Management	Coral Gables	FL	\$889M	\$5M-15M	\$2M-7M	\$2M
70	Sarah Cammisio	Merrill Lynch Wealth Management	Vienna	VA	\$364M	\$2M-5M	\$500K-3M	\$500K
71	Laura Wellon	UBS Financial Services	Atlanta	GA	\$1.1B	\$7M-12M	\$3M-20M	\$1M
72	Nancy Popovich	Baird	McLean	VA	\$252M	\$1M-5M	\$250K-5M	\$5K
73	Sharon Cunningham	Morgan Stanley Wealth Management	New York	NY	\$360M	\$3.5M-10M	\$1M-3.5M	\$1M
74	Kimberley Hatchett	Morgan Stanley Private Wealth Management	New York	NY	\$840M	\$25M-50M	\$10M-50M	\$5M
75	Joy Kenefick	Wells Fargo Advisors	Charlotte	NC	\$520M	\$8M-20M	\$3M-7M	\$1M
76	Cherie Bond	Morgan Stanley Wealth Management	Glenview	IL	\$569M	\$3.5M-20M	\$2M-4M	\$1M
77	Elizabeth Evans	Merrill Lynch Wealth Management	Indianapolis	IN	\$769M	\$4M-14M	\$2M-10M	\$1M
78	Brooke May	Merrill Lynch Wealth Management	Indianapolis	IN	\$769M	\$1.5M-8M	\$3M-6M	\$500K
79	Valerie Dugan	Morgan Stanley Wealth Management	Hartford	CT	\$329M	\$3M-53M	\$5M-40M	\$1M
80	Shelley Richardson	UBS Financial Services	Los Gatos	CA	\$774M	\$2M-50M	\$2M-20M	\$1M
81	Nicole Primack Andres	Merrill Private Wealth Management	New York	NY	\$1.1B	\$10M-15M	\$10M-20M	\$2.5M
82	Stephanie Ackler	Ackler Wealth Management of Wells Fargo Advisors	New York	NY	\$283M	\$1M-15M	\$1M-6M	\$1M
83	Courtney Moore	Merrill Private Wealth Management	New York	NY	\$1.5B	\$5M-1B	\$5M-1B	\$10M
84	Dianna L. Smith	Morgan Stanley Wealth Management	Leawood	KS	\$932M	\$10M-20M	\$3.5M-15M	\$1M
85	Anh Tran	JanHobbs Financial Group/LPL Financial	Orange	CA	\$250M	\$1M-10M	\$1M-12M	\$1M
86	Stefani Bollag	Merrill Lynch Wealth Management	New York	NY	\$1.3B	\$2M-15M	\$750K-50M	\$1M
87	Angela Mwanza	UBS Private Wealth Management	New York	NY	\$573M	\$25M-100M	\$10M-100M	\$25M
88	Heather Locus	BDF	Itasca	IL	\$4.1B	\$2M-10M	\$1M-15M	\$1M
89	Bonnie Richards	UBS Private Wealth Management	New York	NY	\$1.2B	\$10M-100M	\$10M-100M	\$10M
90	Annie Etchegoyhen	Merrill Lynch Wealth Management	Menlo Park	CA	\$725M	\$5M-20M	\$3M-12M	\$0
91	Julia Carlson	Financial Freedom Wealth Management Group/LPL Financial	Newport	OR	\$260M	\$1M-2.5M	\$375K-1M	\$0
92	Pam Segal Rhodes	UBS Financial Services	Miami	FL	\$624M	\$50M-500M	\$7.5M-100M	\$5M
93	Julie Shechtman	Morgan Stanley Wealth Management	Glenview	IL	\$232M	\$1M-20M	\$1M-20M	\$500K
94	Malia Morales	Merrill Private Wealth Management	Houston	TX	\$2.8B	\$25M-50M	\$25M-50M	\$10M
95	Susan Harrington	Morgan Stanley Wealth Management	Rockville	MD	\$295M	\$5M-8M	\$1M-3M	\$1M
96	Beth Norman	RBC Wealth Management	Madison	WI	\$505M	\$500K-3M	\$500K-3M	\$100K

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97	Joanne Zhong	UBS Financial Services	San Francisco	CA	\$655M	\$10M-200M	\$5M-100M	\$5M
98	Michele Dandrea	Morgan Stanley Wealth Management	Mclean	VA	\$372M	\$1.2M-10M	\$1M-6M	\$1M
99	Catherine Chen	RBC Wealth Management	San Francisco	CA	\$1.8B	\$2M-50M	\$2M-50M	\$5M
100	Lee Ann Coburn	Merrill Lynch Wealth Management	Walnut Creek	CA	\$838M	\$2M-16M	\$1M-1.2M	\$500K
101	Kim Luu-Tu	Ameriprise Financial Services	Vienna	VA	\$334M	\$500K-11M	\$100K-6.5M	\$250K
102	Sallie Behnke	Morgan Stanley Wealth Management	Dallas	TX	\$916M	\$10M-80M	\$5M-50M	\$1M
103	Christina Yuni	Merrill Lynch Wealth Management	Palo Alto	CA	\$1.2B	\$3M-15M	\$2M-10M	\$1M
104	Eden Lopez-Robles	JP Morgan Securities	New York	NY	\$3.1B	\$10M-75M	\$2M-10M	\$2M
105	Susan Feitelberg	Morgan Stanley Wealth Management	New York	NY	\$189M	\$3M-15M	\$1M-5M	\$1M
106	Jennifer Facini	ARS Wealth Advisors	St. Petersburg	FL	\$570M	\$1M-3M	\$800K-1.2M	\$500K
107	Courtney Horn	Ameriprise Financial Services	San Francisco	CA	\$393M	\$500K-8M	\$1.3M-5M	\$1M
108	Paula Steinberg	JP Morgan Securities	New York	NY	\$3.1B	\$2M-50M	\$5M-10M	\$2M
109	Nadine Faulis	Merrill Lynch Wealth Management	Las Vegas	NV	\$749M	\$5M-20M	\$3M-10M	\$1M
110	Jen Hicks	Wetherby Asset Management	San Francisco	CA	\$5B	\$30M-60M	\$20M-40M	\$10M
111	Mary Ellen Krueger	Aspiriant	Milwaukee	WI	\$12.2B	\$5M-75M	\$2M-20M	\$1.5M
112	Vanessa Martinez	HighTower Advisors	Deerfield	IL	\$1.2B	\$5M-20M	\$2M-15M	\$2M
113	Ruth Berger	HighTower Advisors	New York	NY	\$448M	\$3M-15M	\$2M-10M	\$1M
114	Sandi Bragar	Aspiriant	San Francisco	CA	\$12.2B	\$5M-75M	\$5M-25M	\$3M
115	Cassandra Smalley	Doyle Wealth Management	St. Petersburg	FL	\$941M	\$2M-5M	\$1M-5M	\$0
116	Catherine Fang	Morgan Stanley Wealth Management	Menlo Park	CA	\$304M	\$5M-50M	\$2M-10M	\$5M
117	Kimberly Maez	Ameriprise Financial Services	Englewood	CO	\$476M	\$500K-8M	\$100K-6M	\$0
118	Haley Kaufman	Merrill Lynch Wealth Management	Washington	DC	\$799M	\$3M-8M	\$2M-5M	\$1M
119	Laura Steckler	Steckler Wealth Management Group/ Raymond James	Coral Gables	FL	\$245M	\$1M-5M	\$1M-5M	\$1M
120	Kate Waters	Morgan Stanley Wealth Management	New York	NY	\$408M	\$5M-50M	\$2M-20M	\$0
121	Alli McCartney	UBS Private Wealth Management	New York	NY	\$1.2B	\$15M-100M	\$5M-30M	\$5M
122	Lisa Katterhenry Howe	Katterhenry Investment Group	Troy	OH	\$562M	\$750K-2M	\$500K-1.5M	\$750K
123	Rachel Kelley	Merrill Private Wealth Management	Burlington	MA	\$589M	\$5M-50M	\$2.5M-20M	\$2.5M
124	Kimberly St. Pierre	Ameriprise Financial Services	Plymouth Meeting	PA	\$387M	\$1M-30M	\$1M-15M	\$250K
125	Ariel Jacobs	Merrill Lynch Wealth Management	Fort Lee	NJ	\$906M	\$1M-20M	\$800K-4M	\$250K
126	Nadia Allaudin	Merrill Lynch Wealth Management	Century City	CA	\$435M	\$1M-400M	\$1.5M-5M	\$0
127	Debra Tagg	Brennan Financial Services	Addison	TX	\$260M	\$2M-20M	\$2M-10M	\$500K
128	Claudine Callison-Siero	Morgan Stanley Wealth Management	Little Falls	NJ	\$1.5B	\$2.5M-20M	\$1M-2.5M	\$1M

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129	Holley Pierce	Merrill Lynch wealth Management	Montgomery	AL	\$125M	\$300K-12M	\$830K	\$300K
130	Gretchen Hollstein	Litman Gregory Asset Management	Larkspur	CA	\$2.1B	\$8M-10M	\$3M-10M	\$3M
131	Christine Emond	Ameriprise Financial Services	Fairfax	VA	\$467M	\$1.5M-15M	\$850K-12M	\$0
132	Alexandra Van Meurs	UBS Financial Services	Houston	TX	\$268M	\$1M-25M	\$1M-10M	\$250K
133	Pamela Rigsby	Pursuit Wealth Strategies	Raleigh	NC	\$217M	\$500K-5M	\$500K-5M	\$600K
134	Melissa Flammio Clark	Wells Fargo Advisors	Melbourne	FL	\$300M	\$500K-10M	\$250K-5M	\$250K
135	Michelle Young	Ameriprise Financial Services	Edina	MN	\$315M	\$650K-8M	\$500K-6M	\$500K
136	Andrea C. DeVincenzi	Wells Fargo Advisors	Walnut Creek	CA	\$1.1B	\$5M-15M	\$3M-6M	\$2M
137	Rachel Cohen	Morgan Stanley Wealth Management	West Conshohocken	PA	\$290M	\$2M-20M	\$1M-15M	\$1M
138	Jodi Vleck	Beta Wealth Group	San Diego	CA	\$285M	\$3M	\$2M	\$0
139	Wendy Lamberg Greeley	Merrill Lynch Wealth Management	Toledo	OH	\$301M	\$2M-20M	\$1.5M-12.5M	\$500K
140	Kara Boccella	Camden Capital	El Segundo	CA	\$477M	\$2M-25M	\$2M-60M	\$1M
141	Elizabeth Flavin Crawford	Sendero Wealth Management	San Antonio	TX	\$3.4B	\$20M-30M	\$10M-15M	\$1M
142	Heather Carter Molin	UBS Private Wealth Management	New York	NY	\$2.6B	\$5M-35M	\$5M-20M	\$2M
143	Christina Paul	Morgan Stanley Wealth Management	New York	NY	\$295M	\$2M-15M	\$1M-20M	\$1M
144	Karen Robbins	UBS Financial Services	Newtown	PA	\$648M	\$250K-9M	\$1M-3M	\$500K
145	Ilona Box	Raymond James & Associates	Naples	FL	\$367M	\$2M-6M	\$1M-4M	\$1M
146	Mary Sexton	Morgan Stanley Wealth Management	Washington	DC	\$500M	\$2.5M-30M	\$1M-10M	\$500K
147	Jenee Lister	Merrill Lynch Wealth Management	Oklahoma City	OK	\$466M	\$1.5M-8M	\$250K-8M	\$1.5M
148	Traci Richmond	Raymond James Financial Services	Bethesda	MD	\$390M	\$100K-2.5M	\$50K-1.5M	\$5K
149	CJ Charlebois Melendy	Ameriprise Financial Services	Williston	VT	\$267M	\$2M-15.5M	\$500K-5M	\$250K
150	Kelly Bolton	Merrill Lynch Wealth Management	Germantown	TN	\$498M	\$1M-5M	\$1M-2.5M	\$250K
151	Elizabeth Engelmann	UBS Financial Services	Bloomington	MN	\$462M	\$2M-12M	\$1M-6M	\$1M
152	Sue Moore-Bommarito	Raymond James & Associates	Birmingham	MI	\$257M	\$3M-6M	\$1M-3M	\$1M
153	Dawn Starks	Raymond James Financial Services	Asheville	NC	\$188M	\$500K-2.5M	\$500K-2.5M	\$100K
154	Katie Pan	Merrill Lynch Wealth Management	Pasadena	CA	\$350M	\$5M-20M	\$2M-10M	\$1M
155	Amy Cady	Wells Fargo Advisors	Bartlesville	OK	\$288M	\$1M-2M	\$500K-1M	\$250K
156	Samantha Parker Hopkins	UBS Financial Services	Tampa	FL	\$2.2B	\$2.3M-4.5M	\$1M-4.5M	\$1M
157	Danielle Grande-Cosentino	Merrill Lynch Wealth Management	White Plains	NY	\$375M	\$1M-10M	\$1M-17M	\$1M
158	Joyce Streithorst	Frisch Financial Group	Melville	NY	\$450M	\$1.5M-7.5M	\$1M-5M	\$1M
159	Jodi Chang	Wells Fargo Advisors	Honolulu	HI	\$160M	\$1.5M-10M	\$1M-5M	\$1M
160	Lynn DeNucci	Merrill Lynch Wealth Management	Springfield	MA	\$895M	\$1M-10M	\$750K-5M	\$1M

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161	Mindy Fishel	Alex.Brown/Raymond James	San Francisco	CA	\$520M	\$5M-7.5M	\$7.5M-15M	\$1M
162	Ileana Dominguez	UBS Financial Services	Henderson	NV	\$290M	\$1M-70M	\$500K-45M	\$1M
163	Merle Zislin	Morgan Stanley Wealth Management	Boca Raton	FL	\$232M	\$2M-8M	\$500K-3M	\$250K
164	Winnie Sun	Sun Group Wealth Partners/LPL	Irvine	CA	\$180M	\$250K-1M	\$500K-3M	\$5K
165	Dana Pollard	Wells Fargo Advisors	Woodbury	MN	\$300M	\$1M-5M	\$100K-2M	\$0
166	Tiffany Mock Briggs	Merrill Lynch Wealth Management	San Antonio	TX	\$406M	\$1M-35M	\$500K-35M	\$500K
167	Carolyn Weaver	Morgan Stanley Wealth Management	Peoria	IL	\$881M	\$1M	\$1M-2M	\$500K
168	Barbara Blacklock	Wells Fargo Advisors	Boca Raton	FL	\$286M	\$1M-5M	\$500K-1M	\$1M
169	Ryan Mathes	Ameriprise Financial Services Services, Inc.	The Woodlands	TX	\$602M	\$500K-7M	\$300K-5M	\$1M
170	Molly Chelovich	Merrill Lynch Wealth Management	Grand Rapids	MI	\$256M	\$2-5M	\$800K-3M	\$300K
171	Brenda Vanderslice	UBS Financial Services	Memphis	TN	\$288M	\$2M-26M	\$1.1M-24M	\$500K
172	Angela Tarara	Wells Fargo Advisors	St. Paul	MN	\$160M	\$350K-1.2M	\$350K-1.2M	\$500K
173	Kimberlee Barrett-Johnson	Ameriprise Financial Services	Charlottesville	VA	\$161M	\$500K-20M	\$500K-15M	\$250K
174	Marlynn Ma	Merrill Lynch Wealth Management	Pasadena	CA	\$474M	\$15M-35M	\$1M-10M	\$1M
175	Tiffany Kellner	UBS Financial Services	Miamisburg	OH	\$1.4B	\$1M-10M	\$1M-10M	\$1M
176	Stacey Barrins	Morgan Stanley Wealth Management	Chicago	IL	\$701M	\$2M-15M	\$1M-10M	\$1M
177	Christine Satterfield	Wells Fargo Advisors	Asheville	NC	\$374M	\$1.2M-5M	\$1M-5M	\$750K
178	Laurie Tebon	Merrill Lynch Wealth Management	Waukesha	WI	\$269M	\$650K-3M	\$500K-2M	\$250K
179	Kathleen Lach	UBS Financial Services	Columbus	OH	\$198M	\$2M-7M	\$800K-5M	\$1M
180	Stephanie Bass	Wells Fargo Advisors	Raleigh	NC	\$204M	\$1M-10M	\$1M-5M	\$1M
181	Heather Churchill	Morgan Stanley Wealth Management	Orlando	FL	\$639M	\$2M-20M	\$1M-7M	\$1M
182	Angela Dax	Ameriprise Financial Services	Hermosa Beach	CA	\$253M	\$500K-10M	\$500K-5M	\$1M
183	Heather Goodbody	Merrill Private Wealth Management	Pittsford	NY	\$765M	\$7M-150M	\$20M-90M	\$5M
184	Betsy Nelson	UBS Private Wealth Management	Chicago	IL	\$2.4B	\$12M-35M	\$15M-45M	\$2M
185	Jill Lawrence	Ameriprise Financial Services	Minnetonka	MN	\$554M	\$1.5M-7M	\$500K-5M	\$1M
186	Carrie Turcotte	Wells Fargo Advisors Financial Network	Chattanooga	TN	\$168M	\$750K-2.5M	\$500K-2M	\$0
187	Mary Jo Harper	Merrill Private Wealth Management	Exton	PA	\$204M	\$2M-6M	\$1.5M-5M	\$850K
188	Jennifer Sampson	UBS Financial Services	Tyler	TX	\$457M	\$1.5M-8M	\$1M-8M	\$1M
189	Camille Gagliardi	Ameriprise Financial Services	West Hartford	CT	\$204M	\$500K-8M	\$100K-6M	\$500K
190	Jacqueline Cicale	Merrill Lynch Wealth Management	White Plains	NY	\$637M	\$2M-20M	\$2M-10M	\$1M
191	Adrienne Yamaki	Morgan Stanley Wealth Management	San Francisco	CA	\$122M	\$4M-10M	\$3M-5M	\$2M
192	Laura Martin Miri	Martin Wealth Management	Menlo Park	CA	\$170M	\$1M-20M	\$500K-10M	\$500K

# WORKING MOTHER TOP WEALTH ADVISOR MOMS 2019

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RANK	NAME	FIRM	CITY	STATE	TEAM CUSTODIED ASSETS*	TYPICAL NET WORTH OF RELATIONSHIPS	TYPICAL SIZE OF HOUSEHOLDS	MINIMUM ACCOUNT SIZE OF NEW BUSINESS**
193	Jennifer Kraus	UBS Financial Services	New York	NY	\$527M	\$5M-20M	\$3M-10M	\$1M
194	Lisa LaVecchia	Merrill Lynch Wealth Management	Florham Park	NJ	\$366M	\$2M-10M	\$1.5M-7.5M	\$1M
195	Amy Smith	Ameriprise Financial Services	Novi	MI	\$190M	\$800K-13M	\$700K-4M	\$500K
196	Carol Mani Johnston	UBS Financial Services	San Antonio	TX	\$178M	\$2M-10M	\$2M-10M	\$1M
197	Janette Acton	Merrill Lynch Wealth Management	Oak Brook	IL	\$343M	\$1M-10M	\$1M-10M	\$750K
198	Dawn Smith	Ameriprise Financial Services	Hopkinton	MA	\$300M	\$1M-5M	\$500K-3M	\$0
199	Sara Pitcel	Morgan Stanley Wealth Management	Waukesha	WI	\$645M	\$1M-50M	\$500K-35M	\$1M
200	Kristen Trovas	Merrill Lynch Wealth Management	Cedar Rapids	IA	\$300M	\$2M-10M	\$600K-4M	\$250K
201	Carolyn Nolan	Ameriprise Financial Services	Winchester	MA	\$135M	\$500K-6M	\$100K-6M	\$0
202	Suzanne Akian	Morgan Stanley Wealth Management	New York	NY	\$1.2B	\$3M-15M	\$3M-11M	\$2M
203	Liz Poplin	Merrill Lynch Wealth Management	Northbrook	IL	\$908M	\$1M-20M	\$1M-20M	\$0
204	Marti Marache	Morgan Stanley Wealth Management	Greenwich	CT	\$197M	\$1.5M-7M	\$1M-3.5M	\$500K
205	Melissa Riven Mirabile	UBS Financial Services	Albany	NY	\$127M	\$1.5M-4.5M	\$900K-4M	\$1M
206	Shea Boulware-Creed	RBC Wealth Management	Peoria	AZ	\$225M	\$500K-5M	\$500K-3M	\$100K
207	Diane McMinds	UBS Financial Services	Napa	CA	\$389M	\$1M-8M	\$100K-2.5M	\$250K
208	Becca Siegel	Merrill Lynch Wealth Management	Austin	TX	\$623M	\$1M-10M	\$1M-10M	\$1M
209	Galit Ben-Joseph	JP Morgan Securities	New York	NY	\$150M	\$5M-1B	\$3M-10M	\$0
210	Talya Bock	Merrill Lynch Wealth Management	Washington	DC	\$684M	\$400K-10M	\$500K-4M	\$250K
211	Jessica Kartzinel	UBS Financial Services	Henderson	NV	\$290M	\$1M-15M	\$500K-45M	\$1M
212	Jenny Santek	Morgan Stanley Wealth Management	Madison	WI	\$210M	\$2M-10M	\$500K-7M	\$500K
213	Stephanie Smith Christiano	Merrill Lynch Wealth Management	Dover	DE	\$866M	\$875K-4.5M	\$600K-3.5M	\$0
214	Laurie Barry	UBS Financial Services	Chicago	IL	\$3.4B	\$2M-3M	\$500K-1.5M	\$1M
215	Reiko Evangelista	Wells Fargo Advisors	Burlingame	CA	\$220M	\$250K-5M	\$250K-5M	\$250K
216	Amy Trotter	Wells Fargo Advisors	Barrington	IL	\$370M	\$750K-5M	\$500K-5M	\$1M
217	Dawn Dupre	Morgan Stanley Wealth Management	Berwyn	PA	\$362M	\$2M	\$1.2M	\$250K
218	Katerina Simonetti	UBS Private Wealth Management	Philadelphia	PA	\$475M	\$5M-85M	\$4M-60M	\$2M
219	Lori Gervais	Baird	Mequon	WI	\$400M	\$3M-30M	\$2M-20M	\$2M
220	Sarah Damsgaard	JP Morgan Securities	Chicago	IL	\$625M	\$10M-5B	\$5M-100M	\$10M
221	Kathleen Wilson	Merrill Lynch Wealth Management	New York	NY	\$400M	\$1.2M-6M	\$900K-4.5M	\$250K
222	Marta Shen	Spring Street Financial/Raymond James	Atlanta	GA	\$172M	\$1M-10M	\$250K-8M	\$500K
223	Valerie R. Leonard	Grinkmeyer Leonard Financial/ Commonwealth Financial Network	Birmingham	AL	\$232M	\$1.5M-10M	\$250K-7.2M	\$100K
224	Kirsten Tuzzo	Merrill Lynch Wealth Management	Boca Raton	FL	\$868M	\$3M-10M	\$1.7M-8M	\$1M

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RANK	NAME	FIRM	CITY	STATE	TEAM CUSTODIED ASSETS*	TYPICAL NET WORTH OF RELATIONSHIPS	TYPICAL SIZE OF HOUSEHOLDS	MINIMUM ACCOUNT SIZE OF NEW BUSINESS**
225	Maria Carolina Cardenas	UBS Financial Services	Coral Gables	FL	\$149M	\$2.5M-15M	\$1M-10M	\$1M
226	Sheri Billings	Merrill Lynch Wealth Management	Weston	FL	\$436M	\$2M-10M	\$2M-15M	\$1M
227	Kelly Rindock	Raymond James & Associates	Center Valley	PA	\$148M	\$1M-7M	\$500K-5M	\$250K
228	Rose Marie McBride	Morgan Stanley Private Wealth Management	Chicago	IL	\$401M	\$500K-2M	\$500K-1M	\$100K
229	Lori Rhyner	Wells Fargo Advisors	Jackson	WY	\$229M	\$2.5M-10M	\$1M-5M	\$2M
230	Kelli Rogan	Merrill Lynch Wealth Management	Duluth	GA	\$828M	\$3M-10M	\$2.5-8M	\$1M
231	Dana Nightingale	Obermeyer Wood Investment Counsel	Denver	CO	\$1.5B	\$2M-10M	\$1M-8M	\$1M
232	Rita McCluskey	Merrill Lynch Wealth Management	Indianapolis	IN	\$234M	\$2.5M	\$2M	\$1M
233	Mary L. Tomanek	Morgan Stanley Graystone	Deerfield	IL	\$2.5B	\$10M-60M	\$1M-80M	\$10M
234	Laura Cusenbary	Wells Fargo Advisors	Steamboat Springs	CO	\$473M	\$500K-3M	\$1M-3M	\$500K
235	Ashley H. Laubach	UBS Financial Services	Orlando	FL	\$144M	\$750K-2M	\$750K-2M	\$250K
236	Mary Helen Condon Moore	Merrill Lynch Wealth Management	Charleston	SC	\$528M	\$3M	\$1M	\$500K
237	Shelby Fink	Ameriprise Financial Services	Lexington	KY	\$298M	\$800K-3M	\$500K-2M	\$500K
238	Lisa M. Seigel	Merrill Lynch Wealth Management	Miami	FL	\$268M	\$4M-10M	\$1M-5M	\$2.5M
239	Sandra Wang	Morgan Stanley Wealth Management	Palo Alto	CA	\$686M	\$4M-8M	\$1.5M-6M	\$1M
240	Lauren Pearson	HighTower Advisors	Birmingham	AL	\$93M	\$3M-40M	\$1M-12M	\$2M
241	Seema Khanna	Morgan Stanley Wealth Management	New York	NY	\$204M	\$20M-100M	\$20M-25M	\$5M
242	Michele McCallion	Merrill Private Wealth Management	Greenwich	CT	\$413M	\$10M-50M	\$10M-70M	\$10M
243	Kimberly Cawley	Ameriprise Financial Services	Cortland	NY	\$161M	\$500K-3M	\$300K-3M	\$300K
244	Karen Keusayan	Wells Fargo Advisors	Los Angeles	CA	\$1.6B	\$10M-50M	\$3M-20M	\$1M
245	Kay Grasman	Morgan Stanley Wealth Management	New York	NY	\$844M	\$10M-50M	\$10M-20M	\$2M
246	Jennifer Dallas	Morgan Stanley Wealth Management	Barrington	IL	\$160M	\$250K-15M	\$250K-15M	\$250K
247	Caryl-Lyn Mazullo	UBS Financial Services	Akron	OH	\$167M	\$1M-20M	\$500K-30M	\$500K
248	Kari Boxleitner	Wells Fargo Advisors	Loveland	CO	\$211M	\$500K-2M	\$300K-1.5M	\$0
249	Eva Marina Ovejero	Morgan Stanley Wealth Management	Miami	FL	\$273M	\$30M-90M	\$4M-12M	\$2M
250	Clare Fildes-Schwemlein	Janney Montgomery Scott	Chillicothe	OH	\$444M	\$1M	\$250K-2M	\$0
251	Beth Kraszewski	Keating and Associates - Raymond James Financial Services	Chicago	IL	\$437M	\$2M-20M	\$1M-20M	\$0
252	Marilyn Keyser	Morgan Stanley Wealth Management	Purchase	NY	\$1.8B	\$5M-10M	\$2M-5M	\$2M
253	Nelrae Ali	Wells Fargo Advisors	Jacksonville	FL	\$158M	\$1M-50M	\$500K-43M	\$250K
254	Katherine Brady	RNL & Associates	Rutland	VT	\$258M	\$500K-1M	\$50K-1.5M	\$0
255	Dana Margiotta Frellick	Morgan Stanley Wealth Management	Bloomfield Hills	MI	\$100M	\$250K-5M	\$700K-2M	\$100K
256	Miye Wire	MiyeWire	Reston	VA	\$154M	\$500K-5M	\$100K-5M	\$0



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RANK	NAME	FIRM	CITY	STATE	TEAM CUSTODIED ASSETS*	TYPICAL NET WORTH OF RELATIONSHIPS	TYPICAL SIZE OF HOUSEHOLDS	MINIMUM ACCOUNT SIZE OF NEW BUSINESS**
257	Catina Koenig	Baird	Edina	MN	\$180M	\$2M-25M	\$500K-15M	\$1M
258	Christine Abbott	UBS Financial Services	New York	NY	\$457M	\$1.5M-10M	\$1.5M-10M	\$0
259	Fay DeBellis	Morgan Stanley Wealth Management	Minneapolis	MN	\$299M	\$15M	\$2M-10M	\$1M
260	Kimberly Evans	Wells Fargo Advisors	Atlanta	GA	\$160M	\$1M-50M	\$1M-20M	\$1M
261	Kimberlee Bouska	Addison Avenue Investment Services / Raymond James	Beaverton	OR	\$174M	\$700K-1.5M	\$500-700K	\$200K
262	Jen Haldemann	Baird	Milwaukee	WI	\$583M	\$1M-50M	\$100K-5M	\$100K
263	Kristen Scarpa Bissett	UBS Private Wealth Management	West Palm Beach	FL	\$1B	\$5M-250M	\$25M-150M	\$5M
264	Kristin Bloom	UBS Financial Services	Westport	CT	\$351M	\$3M-6M	\$1M-3M	\$1M
265	Amber Seale	Seale Wealth Management/Raymond James	Dallas	TX	\$182M	\$2M-90M	\$2M-16M	\$1M
266	Kathryn Thompson	Merrill Lynch Wealth Management	Albuquerque	NM	\$817M	\$2.5M-10M	\$1.5M-5M	\$400K
267	Teri Kelley	Morgan Stanley Wealth Management	Scottsdale	AZ	\$581M	\$1M-15M	\$1.6M-2M	\$1M
268	Caren Poletti Williams	Morgan Stanley Wealth Management	Nashville	TN	\$227M	\$1M-5M	\$500K-3M	\$500K
269	Sammie Kothari Peng	Merrill Lynch Wealth Management	Brea	CA	\$1.2B	\$3M-7.5M	\$1M-3M	\$1M
270	Kathleen Allison	Morgan Stanley Wealth Management	Rochester	MN	\$324M	\$500K-15M	\$500K-3.1M	\$25K
271	Stephanie Zebrowski	Merrill Private Wealth Management	Vienna	VA	\$718M	\$500K-5M	\$500K-5M	\$250K
272	Sarah Carlson	LPL Financial/Fulcrum Financial Group	Spokane	WA	\$125M	\$500K-10M	\$500K-2M	\$0
273	Rebekah Faasau	Merrill Lynch Wealth Management	Boise	ID	\$353M	\$1M-10M	\$607K-15.8M	\$800K
274	Casey Kriedman	UBS Private Wealth Management	New York	NY	\$512M	\$10M-1B	\$5M-75M	\$2M
275	Wendy Eddy	Wells Fargo Advisors	Long Beach	CA	\$120M	\$1M-80M	\$500K-25M	\$250K
276	Maureen Ayril	Wells Fargo Advisors	Tampa	FL	\$130M	\$2.5M-5M	\$2.5M-5M	\$1M
277	Lisa Angle	Merrill Lynch Wealth Management	Roanoke	VA	\$285M	\$600K-1.5M	\$500K-3M	\$500K
278	Felicia Di Silvestro	Morgan Stanley Wealth Management	Chicago	IL	\$330M	\$5M-10M	\$3M-7M	\$1M
279	Heather Barnett	Barnett Financial Partners	Keokuk	IA	\$202M	\$500K-5M	\$250K-4M	\$250K
280	Noel Brown	Morgan Stanley Wealth Management	Honolulu	HI	\$284M	\$2M-20M	\$2M-20M	\$0
281	W Janet Dougherty	Cresset	Chicago	IL	\$344M	\$25M-50M	\$15M-25M	\$10M
282	Brittany Hartnett	Merrill Lynch Wealth Management	Atlanta	GA	\$79.6B	\$4M-6M	\$500K-2M	\$500K
283	Mary Ware	Wells Fargo Advisors	Charlotte	NC	\$820M	\$500K-6M	\$300K-5M	\$250K
284	Mary Batcha	Merrill Lynch Wealth Management	Yardley	PA	\$327M	\$1M-8M	\$1M-16M	\$1M
285	Laurie Long-Engel	Morgan Stanley Wealth Management	Orland Park	IL	\$158M	\$500K-1M	\$1M-2M	\$100K
286	Jennifer Shydler	Merrill Lynch Wealth Management	Las Vegas	NV	\$749M	\$1M-10M	\$500K-3M	\$1M
287	Hilary J. Doherty	RBC Wealth Management	Kirkland	WA	\$347M	\$2M-8M	\$1M-5M	\$250K
288	Michelle Morales	Merrill Lynch Wealth Management	Ontario	CA	\$469M	\$2M-15M	\$750K-8M	\$250K

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RANK	NAME	FIRM	CITY	STATE	TEAM CUSTODIED ASSETS*	TYPICAL NET WORTH OF RELATIONSHIPS	TYPICAL SIZE OF HOUSEHOLDS	MINIMUM ACCOUNT SIZE OF NEW BUSINESS**
289	Katie DeMarco	UBS Financial Services	New York	NY	\$238M	\$2.5M-10M	\$250K-1M	\$100K
290	Danielle Gilbert-Richard	Merrill Lynch Wealth Management	Burlington	VT	\$408M	\$5M	\$1M-5M	\$500K
291	Erika Puzik	Ameriprise Financial Services	Los Angeles	CA	\$140M	\$1.5M-10M	\$50K-7M	\$100K
292	Maureen Novak	Morgan Stanley Wealth Management	Syracuse	NY	\$597M	\$2M-20M	\$1M-10M	\$1M
293	Brooke McGeehan	RBC Wealth Management	Princeton	NJ	\$157M	\$750K-10M	\$250K-10M	\$250K
294	YC Lama	Morgan Stanley Wealth Management	Beverly Hills	CA	\$218M	\$5M-30M	\$1M-7M	\$1M
295	Lisa Thorpe	Wells Fargo Advisors	Saint George	UT	\$226M	\$500K-5M	\$500K-1M	\$250K
296	Rosalie Hunter	Merrill Private Wealth Management	Philadelphia	PA	\$616M	\$25M	\$50M	\$5M
297	Michelle Mabry	Client 1st Advisory Group	Hattiesburg	MS	\$170M	\$1M-10M	\$585K-3M	\$250K
298	Kate Salsman	Morgan Stanley Wealth Management	Lexington	KY	\$264M	\$3.5M-15M	\$1M-5M	\$500K
299	April Oliver	Ameriprise Financial Services	Charlotte	NC	\$203M	\$500K-5M	\$200K-2M	\$0
300	Leanne Scull	Raymond James & Associates	Memphis	TN	\$175M	\$500K-12M	\$100K-10M	\$250K
301	Jennifer W. Iburguen	Ameriprise Financial Services	Plano	TX	\$278M	\$2M-5M	\$750K-3M	\$250K
302	Mollie Brennan	Merrill Lynch Wealth Management	Lexington	KY	\$157M	\$1M-3M	\$1M-12M	\$0
303	Melinda Brewer	Morgan Stanley Wealth Management	Oklahoma City	OK	\$446M	\$2.5M-10M	\$500K-5M	\$100K
304	Katrina Leali	Merrill Lynch Wealth Management	Peoria	IL	\$521M	\$800K-2M	\$500K-1.5M	\$400K
305	Kimberly Melletat	Raymond James & Associates	Birmingham	MI	\$204M	\$1M-50M	\$5M-50M	\$1M
306	Patti Koogler	Ameriprise Financial Services	Waynesboro	VA	\$157M	\$400K-3M	\$150K-1.8M	\$25K
307	Katie Rouff-Ward	Wells Fargo Advisors	Red Bank	NJ	\$350M	\$500K-2.5M	\$750K-1.2M	\$1M
308	Andrea James	Wells Fargo Advisors	Clive	IA	\$233M	\$1M-25M	\$500K-25M	\$500K
309	Misty Jones	UBS Financial Services	Napa	CA	\$633M	\$1M-10M	\$500K-6M	\$500K
310	Shawna Farnol Bumpus	Morgan Stanley Wealth Management	Perrysburg	OH	\$122M	\$250K-1.5M	\$500K-3.5M	\$100K
311	Laura Christofferson	Alden Capital Management/Raymond James	Bellevue	WA	\$249M	\$1M-5M	\$500K-5M	\$500K
312	Andrea Pfeffer	Morgan Stanley Private Wealth Management	Aventura	FL	\$608M	\$8M-50M	\$1M-10M	\$1M
313	Amanda Manske	Prime Financial Services	Wauwatosa	WI	\$300M	\$500K-3M	\$750K-3.5M	\$0
314	Paula Dougherty	Ameriprise Financial Services	Springfield	MO	\$175M	\$1.5M-5M	\$1M-4M	\$100K
315	Kjersten Lazar	Raymond James & Associates	Somers	NY	\$185M	\$100K-35M	\$100K-16M	\$0
316	MaryAnn Pietromonaco	Morgan Stanley Wealth Management	Cincinnati	OH	\$251M	\$2.5M	\$500K-1M	\$500K
317	Limei Yu	UBS Financial Services	Chicago	IL	\$840M	\$1M-50M	\$500K-25M	\$500K
318	Beth Jeter Hrubala	Raymond James Financial Services	Spartanburg	SC	\$161M	\$1M-10M	\$350K-2.5M	\$250K
319	Sharon Hayut	Morgan Stanley Wealth Management	New York	NY	\$244M	\$1M-10M	\$500K-50M	\$500K
320	Christina Schatz	Morgan Stanley Wealth Management	New York	NY	\$727M	\$5M-50M	\$5M-25M	\$0

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RANK	NAME	FIRM	CITY	STATE	TEAM CUSTODIED ASSETS*	TYPICAL NET WORTH OF RELATIONSHIPS	TYPICAL SIZE OF HOUSEHOLDS	MINIMUM ACCOUNT SIZE OF NEW BUSINESS**
321	Samantha Price-Koontz	Merrill Lynch Wealth Management	Montvale	NJ	\$139M	\$1M-2.5M	\$100K-500K	\$500K
322	Roz O'Connor	Morgan Stanley Wealth Management	New York	NY	\$606M	\$1M-20M	\$3M-10M	\$1M
323	Noelle Smith	Innovative Financial Planning	Ramsey	NJ	\$220M	\$50K-5M	\$250K-1M	\$0
324	Gracelyn Root	Wells Fargo Advisors	Westlake Village	CA	\$160M	\$2.5M-10M	\$1M-5M	\$1M
325	Courtney Lisecki	Morgan Stanley Wealth Management	New York	NY	\$418M	\$2M-15M	\$2M-15M	\$500K
326	Cristen Moore	Wells Fargo Advisors	Boston	MA	\$250M	\$3M-50M	\$1M-20M	\$1M
327	Dana Macaluso	UBS Financial Services	New York	NY	\$792M	\$5M-15M	\$750K-5M	\$750K
328	Katie Solvesky	Merrill Lynch Wealth Management	Canfield	OH	\$1.3B	\$3M-35M	\$1M-25M	\$0
329	Molly Cloud	Morgan Stanley Wealth Management	Franklin	TN	\$392M	\$2M-300M	\$1M-320M	\$1M
330	Susan Cassell	Merrill Lynch Wealth Management	Lexington	KY	\$249M	\$400K-20M	\$400K-2M	\$400K
331	Elizabeth Eckert	Morgan Stanley Wealth Management	Indianapolis	IN	\$177M	\$1M-5M	\$250K-2M	\$500K
332	Ashley Ament	Merrill Lynch Wealth Management	Scottsdale	AZ	\$361M	\$500K-2.5M	\$250K-2.5M	\$250K
333	Renee Hof-Lacey	Morgan Stanley Wealth Management	Birmingham	MI	\$468M	\$500K-3M	\$500K-30M	\$500K
334	Lisa Amster	Morgan Stanley Private Wealth Management	Los Angeles	CA	\$1.7B	\$20M-200M	\$10M-100M	\$5M
335	Amy Sorrels	Merrill Lynch Wealth Management	St. Paul	MN	\$316M	\$1.5M-6M	\$750K-2M	\$500K
336	Tammy Escobar-Miller	Morgan Stanley Wealth Management	Scottsdale	AZ	\$190M	\$2M-5M	\$750K-5M	\$750K
337	Alissa Hersch	Morgan Stanley Wealth Management	Seattle	WA	\$928M	\$2M-10M	\$1M-10M	\$1M
338	Natalie Barron	UBS Financial Services	Seal Beach	CA	\$659M	\$900K-5M	\$500K-3M	\$500K
339	Christine Byrne	Back Cove Financial	Falmouth	ME	\$330M	\$250K-2M	\$400K-1.2M	\$0
340	Meredith Parrish	Morgan Stanley Private Wealth Management	West Des Moines	IA	\$1.2B	\$10M-50M	\$5M-20M	\$10M
341	Cynthia Lee	Wells Fargo Advisors	Honolulu	HI	\$143M	\$5M-75M	\$1M-18M	\$1M
342	Shalene Caldwell	Wells Fargo Advisors	Portland	OR	\$223M	\$2M-30M	\$750K-15M	\$750K
343	Melissa Sanchez	Baird	Waukesha	WI	\$337M	\$10K-15M	\$5K-7.5M	\$0
344	Natasha Bonelli	Merrill Lynch Wealth Management	Woodland Hills	CA	\$311M	\$2M-10M	\$500K-20M	\$0
345	Jennifer Murray	Morgan Stanley Wealth Management	Santa Maria	CA	\$354M	\$1M-10M	\$400K-5M	\$250K
346	Asha Tangri Goldstein	Vivaldi Capital Management	Chicago	IL	\$1.7B	\$3M-15M	\$1M-15M	\$0
347	Becky Bridgmon	Morgan Stanley Wealth Management	Memphis	TN	\$302M	\$5M-15M	\$1M-5M	\$300K
348	Aimee Daniels	Merrill Lynch Wealth Management	Pasadena	CA	\$182M	\$1.5M-4M	\$1M-3M	\$250K
349	Tara Cunningham	Ameriprise Financial Services	Tampa	FL	\$200M	\$2M-15M	\$600K-5M	\$100K
350	Laura Blanton	Wells Fargo Advisors	Greenville	SC	\$190M	\$1M-10M	\$850K-5M	\$250K
351	Claire M. S. Meade	Morgan Stanley Wealth Management	McLean	VA	\$89M	\$1M-3M	\$500K-1.5M	\$0
352	Kelli Puhl	UBS Financial Services	Wayzata	MN	\$543M	\$2M-10M	\$1M-10M	\$1M

# WORKING MOTHER TOP WEALTH ADVISOR MOMS 2019

and SHOOK Research's

RANK	NAME	FIRM	CITY	STATE	TEAM CUSTODIED ASSETS*	TYPICAL NET WORTH OF RELATIONSHIPS	TYPICAL SIZE OF HOUSEHOLDS	MINIMUM ACCOUNT SIZE OF NEW BUSINESS**
353	Rebecca Miller	Morgan Stanley Wealth Management	Houston	TX	\$556M	\$1M-7M	\$500K-5M	\$500K
354	Kelly P. Cutsforth	Wells Fargo Advisors	Rochester	MN	\$88M	\$1M-5M	\$500K-2M	\$250K
355	Lis McNealey Spaine	The Arlington Group Investment Consulting	Columbus	OH	\$131M	\$1.2M-10M	\$600K-5M	\$500K
356	Sabina Sewillo	Morgan Stanley Wealth Management	Chicago	IL	\$807M	\$1M-6M	\$2M-8M	\$1M
357	Ashley McHarrie	Merrill Lynch Wealth Management	Beverly	MA	\$2.4B	\$1M-20M	\$1M-15M	\$250K
358	Jenna Suleman	Wells Fargo Advisors	Miami	FL	\$450M	\$25M-1B	\$5M-25M	\$5M
359	Julie Saumsiegle	Morgan Stanley Wealth Management	Fort Lauderdale	FL	\$148M	\$500K-10M	\$1M-10M	\$1M
360	Julie Winston	Morgan Stanley Wealth Management	Wellesley	MA	\$848M	\$1M-18M	\$700K-12M	\$1M
361	Linda Zimmerman	Ameriprise Financial Services	Minnetonka	MN	\$165M	\$1M-8M	\$400K-8M	\$0
362	Elena Kochman	Morgan Stanley Wealth Management	McLean	VA	\$689M	\$750K-10M	\$1M-5M	\$1M
363	Sharon Starkey	Wells Fargo Advisors	Denver	CO	\$173M	\$1M-7M	\$500K-10M	\$100K
364	Jamie O'Rourke	Ameriprise Financial Services	Saint Cloud	MN	\$703M	\$500K-5M	\$100K-5M	\$0
365	Kim Cutler	Morgan Stanley Wealth Management	Torrance	CA	\$709M	\$250K-25M	\$250K-5M	\$250K
366	Michelle Heide	Ameriprise Financial Services	Clinton	NJ	\$154M	\$1M-6M	\$350K-5M	\$350K
367	Meg Prestigiacomio	Baird	Madison	WI	\$219M	\$2M-10M	\$1M-7M	\$500K
368	Patricia Craddock	Morgan Stanley Wealth Management	Providence	RI	\$196M	\$2.5M-5M	\$250K-20M	\$500K
369	Mijanou Spurdle	Morgan Stanley Wealth Management	Miami Beach	FL	\$109M	\$2.5M-5M	\$4M-7M	\$2.5M
370	Kelly Hudak	Ameriprise Financial Services	Charlestown	MA	\$285M	\$1M-3M	\$500K-3M	\$0
371	Cierra Walding	Ameriprise Financial Services	Fort Dodge	IA	\$727M	\$500K-3M	\$250K-1.5M	\$100K
372	Vanessa Garl	Morgan Stanley Wealth Management	Tampa	FL	\$253M	\$1M-3M	\$250-500K	\$100K
373	Ichen Le	Wells Fargo Advisors	Redlands	CA	\$105M	\$1M-7M	\$250K-3M	\$250K
374	Candace Gary	Ameriprise Financial Services	Baton Rouge	LA	\$137M	\$500K-15M	\$1M-5M	\$0
375	Stephanie Franchini	Morgan Stanley Wealth Management	Westport	CT	\$1.8B	\$500K-5M	\$250K-5M	\$500K
376	Kate Eiland	Wells Fargo Advisors	Fresno	CA	\$185M	\$1M-10M	\$1M-4M	\$500K
377	Christine Kaminsky	Morgan Stanley Wealth Management	Pepper Pike	OH	\$104M	\$1M-5M	\$1M-2.5M	\$500K
378	Luz Rosado	Merrill Lynch Wealth Management	Bronx	NY	\$994M	\$3M-50M	\$1M-149M	\$500K
379	Maria Batastini Dell'Ovo	Ameriprise Financial Services	Cranston	RI	\$95M	\$500K-2M	\$250K-1M	\$100K
380	Nina Ingulli	Ameriprise Financial Services	Langhorne	PA	\$101M	\$500K-5M	\$250K-5M	\$100K
381	Amy Roof	Wells Fargo Advisors	Paducah	KY	\$479M	\$350K-75M	\$250K-39M	\$250K
382	Paisley Wessel	Baird	Raleigh	NC	\$125M	\$1M-12M	\$500K-10M	\$1M
383	Liza McCartney	RBC Wealth Management	Florham Park	NJ	\$258M	\$500K-10M	\$500K-10M	\$200K
384	Jessica Osteen	Morgan Stanley Wealth Management	Miami	FL	\$469M	\$2M-10M	\$1M-8M	\$1M

RANK	NAME	FIRM	CITY	STATE	TEAM CUSTODIED ASSETS*	TYPICAL NET WORTH OF RELATIONSHIPS	TYPICAL SIZE OF HOUSEHOLDS	MINIMUM ACCOUNT SIZE OF NEW BUSINESS**
385	Amy Townsend	Wells Fargo Advisors	Clive	IA	\$307M	\$2M-10M	\$1M-5M	\$1M
386	Asta Muldoon	Ameriprise Financial Services	Fall River	MA	\$210M	\$100K-5M	\$250K-1.5M	\$100K
387	Megan Phillips	Wells Fargo Advisors	Gardnerville	NV	\$315M	\$4M	\$910K	\$250K
388	Kerri Connellan	Morgan Stanley Wealth Management	New York	NY	\$763M	\$2M-15M	\$500K-5M	\$2M
389	Michelle Prince	Prince Wealth Management/Raymond James	Jackson	TN	\$127M	\$1M-6M	\$500K-1.5M	\$50K
390	Michelle Kuzma Kempf	HighTower Advisors	Vienna	VA	\$1.4B	\$5M-12M	\$3M-10M	\$1M
391	Jenne Trembley	Ameriprise Financial Services	Thornton	CO	\$758M	\$1M-23M	\$250K-7.3M	\$100K
392	Emily Bemberg	Merrill Lynch Wealth Management	Little Rock	AR	\$235M	\$3.5M-10M	\$1M-8M	\$250K
393	Kirsten Ismail	UBS Financial Services	Boston	MA	\$704M	\$3M-8M	\$250K-12M	\$750K
394	Avi Safaei	JP Morgan Securities	White Plains	NY	\$382M	\$5M-20M	\$5M-25M	\$2M
395	Jen Schneidermann	Morgan Stanley Wealth Management	Walnut Creek	CA	\$356M	\$3M-15M	\$1M-10M	\$2M
396	Janell Daquilante-Akers	Wells Fargo Advisors	Sun City	AZ	\$158M	\$500K-50M	\$100K-30M	\$100K
397	Rees Mason	Merrill Lynch Wealth Management	Ponte Vedra Beach	FL	\$1.1B	\$1M-15M	\$1M-10M	\$500K
398	Andrea Delapp	Ameriprise Financial Services	Salem	OR	\$500M	\$250K-5M	\$100K-2M	\$250K
399	Jennifer Wappaus	PagnatoKarp	Reston	VA	\$1.8B	\$5M-7M	\$3M-5M	\$500K
400	Sarah Kaplan	Kaplan Financial Group	Bethesda	MD	\$257M	\$1M-20M	\$500K-10M	\$100K

## About SHOOK Research

As America's only wealth advisor research organization, SHOOK Research recognizes the most outstanding wealth advisors in the business. The firm's host of quantitative and qualitative deep due-diligence measures includes telephone and in-person meetings. The firm shares its best-practices research through conferences and speaking engagements. SHOOK gives back by raising more than \$300 million for the world of philanthropy. For more information, see [shookresearch.com](http://shookresearch.com).

## METHODOLOGY

SHOOK Research considered wealth advisors who are mothers with at least one child living at home and under the age of 18. Ranking algorithm is based on qualitative measures derived from telephone and in-person interviews and surveys: service models, investing process, client retention, industry experience, review of compliance records, firm nominations, etc.; and quantitative criteria, such as assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research LLC. Neither SHOOK nor *Working Mother* receives compensation from the advisors or their firms in exchange for placement on a ranking.