

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	'17	'16	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					Institutional
1	3		Spuds Powell	Kayne Anderson Rudnick Investment Management	Los Angeles, Calif.		■	■	■			15339	7	15	100
2	4		Robert A. Clarfeld	Clarfeld Financial Advisors	Tarrytown, N.Y.		■	■	■			7300	20	80	100
3	9		Greg Miller	Wellesley Asset Management	Wellesley, Mass.	■	■	■		■		2671	2	5	100
4	6		Charles Zhang	Zhang Financial	Portage, Mich.	■	■	■	■			3241	2	3	100
5	5		Richard Saperstein	HighTower	New York, N.Y.		■	■				9391	15	40	99.9
6	8		Michael Nathanson	The Colony Group	Boston, Mass.	■	■	■				5841	3	8	99.7
7	7		Edward (Ted) Cronin	Manchester Capital Management	Montecito, Calif.		■	■	■			3265	25	60	99.4
8	10		David Lees	myCIO Wealth Partners	Philadelphia, Pa.		■	■				6185	29	35	99.3
9	13		Ted Neild	Gresham Partners	Chicago, Ill.			■				6555	58	63	98.9
10	14		Michael Yoshikami	Destination Wealth Management	Walnut Creek, Calif.	■	■	■				2095	2	8	98.4
11	11		Jon Goldstein	First Republic Investment Management	Menlo Park, Calif.		■	■				7778	50	100	98.3
12	15		Stephan Cassaday	Cassaday and Company	McLean, Va.	■	■	■				2234	1.5	2	98
13	19		Paul Tramontano	First Republic Investment Management	New York, N.Y.			■				7778	25	50	96.7
14	20		Valerie Newell	RiverPoint Capital Management	Cincinnati, Ohio	■	■	■				2497	4	8	96.7
15	24		Robert J. Skinner II	First Republic Investment Management	Menlo Park, Calif.		■	■	■			15152	50	100	96.2
16	17		David Kudla	Mainstay Capital Management	Grand Blanc, Mich.	■	■	■		■		2126	0.5	4	96.2
17	N		Richard Joyner	Tolleson Wealth Management	Dallas, Texas		■	■				5100	34	77	96.1
18	21		Kimberlee Orth	Ameriprise Financial	Wilmington, Del.	■	■	■				1762	4.6	11.5	96
19	N		Paul Pagnato	PagnatoKarp	Reston, Va.		■	■				3432	15	20	95.8
20	30		Erik Morgan	Freestone Capital Management	Seattle, Wash.	■	■	■				3853	4	8	95.3
21	16		Shannon Eusey	Beacon Pointe Advisors	Newport Beach, Calif.	■	■	■	■	■		5880	8	15	95.1
22	18		Grant Rawdin	Wescott Financial Advisory Group	Philadelphia, Pa.	■	■	■	■	■		1857	5.8	21.5	94.7
23	42		David Wright	The Sierra Group of Companies	Santa Monica, Calif.	■	■					2609	1.4	3	94.6
24	40		Robert Balentine	Balentine	Atlanta, Ga.		■	■	■	■		2561	16	25	94.3
25	34		Dale Yahnke	Dowling & Yahnke	San Diego, Calif.		■	■	■			3638	3.2	20	94.3
26	25		Susan Kaplan	Kaplan Financial Services	Newton, Mass.		■	■				1726	3.5	10	94.2
27	N		Kevin Grimes	Grimes & Company	Westborough, Mass.	■	■	■				2223	3.5	7	93.9
28	28		Jeffrey Colin	Baker Street Advisors	San Francisco, Calif.		■	■	■			6636	20	30	93.9
29	36		Kenneth Moraif	Money Matters with Ken Moraif	Plano, Texas	■	■					3850	0.5	1	93.4

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30	22		Joshua Gross	Mill Creek Capital Advisors	Conshohocken, Pa.		■	■	■	■	■	5206	20	40	93.4
31	27		Steven Weinstein	Altair Advisers	Chicago, Ill.		■	■				4225	10	30	93.2
32	53		Daniel Wiener	Adviser Investments	Newton, Mass.	■	■	■				5057	0.5	1.3	93.1
33	39		Kevin Timmerman	Steele Capital Management	Dubuque, Iowa	■	■				■	1827	0.7	3	92.8
34	33		Laila Pence	Pence Wealth Management	Newport Beach, Calif.	■	■	■				1581	2	5	92.3
35	N		David Hou	First Republic Investment Management	Los Angeles, Calif.		■	■	■			15152	40	100	92.1
36	43		Michael Chasnoff	Truepoint Wealth Counsel	Cincinnati, Ohio		■	■				2573	5	8	91.5
37	35		Randall Linde	Ameriprise Financial	Renton, Wash.	■	■	■			■	2153	0.9	2.5	91.4
38	52		Clarke Lemons	WaterOak Advisors	Winter Park, Fla.	■	■	■	■			1749	3	6	91.2
39	41		James B. Stack	Stack Financial Management	Whitefish, Mont.	■	■	■				1185	1.5	5	91.1
40	61		Charles Brighton	Brighton Jones	Seattle, Wash.	■	■	■				4327	3	5	91
41	62		Jon Jones	Brighton Jones	Seattle, Wash.	■	■	■				4327	3	5	91
42	37		Gary Ran	Telemus Capital	Southfield, Mich.	■	■	■				2136	3.5	8	91
43	49		John M. Krambeer	Camden Capital	El Segundo, Calif.		■	■	■		■	1855	15	30	90.8
44	48		Brian Holmes	Signature Estate & Investment Advisors	Los Angeles, Calif.		■	■	■		■	6835	8	24	90.8
45	55		John Waldron	Waldron Private Wealth	Pittsburgh, Pa.		■	■				1423	10	25	90.6
46	50		Alex Shahidi	Advanced Research Investment Solutions	Beverly Hills, Calif.			■	■		■	11210	20	25	90
47	75		Shawn Parker	Ameriprise Financial	Schaumburg, Ill.	■	■	■				2000	2.5	5	86
48	51		Roger Wade	GW & Wade	Wellesley, Mass.	■	■	■				5973	0.7	2.6	85.9
49	46		Jonathan Kuttin	Ameriprise Financial	Melville, N.Y.	■	■	■				1578	1	3.9	85.9
50	N		Sarat Sethi	Douglas C. Lane & Associates	New York, NY		■	■				4886	3.9	10	85.8
51	59		Jordan Waxman	HighTower	New York, N.Y.		■	■				2200	25	50	85.6
52	69		Richard S. Brown	JNBA Financial Advisors	Minneapolis, Minn.	■	■	■				1333	1.5	2	85.5
53	56		Daniel Roe	Budros Ruhlin & Roe	COLUMBUS, Ohio	■	■	■				2637	3.5	4.5	85.5
54	76		Jeffrey Grinspoon	HighTower	Vienna, Va.		■	■			■	1688	4	8	85.4
55	N		Daniel Wilson	Ameriprise Financial	Auburndale, Mass.	■	■					2163	0.3	2.8	85.3
56	72		Randolph (Randy) Peterson	First Republic Investment Management	San Francisco, Calif.	■	■	■				3879	8	12	85.3
57	67		Lawrence Hood	Pacific Portfolio Consulting	Seattle, Wash.	■	■	■			■	3345	12.2	15.9	85.3
58	83		Frank Reilly	Reilly Financial Advisors	La Mesa, Calif.	■	■				■	1794	1	3.5	85.2
59	65		Charles Simmons	Ameriprise Financial	Metairie, La.	■	■	■			■	1834	0.8	1.8	85
60	N		Dagny Maidman	First Republic Investment Management	San Francisco, Calif.		■	■			■	1528	30	60	85
61	54		Lewis Altfest	Altfest Personal Wealth Management	New York, N.Y.	■	■	■				1272	2	5	84.9
62	77		Frank Marzano	GM Advisory Group	Melville, N.Y.		■	■	■		■	1406	8	30	84.9
63	44		Gerard Klingman	Klingman & Associates	New York, N.Y.		■	■				1886	10	15	84.9

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64	57		William Rice	Anchor Capital Advisors	Boston, Mass.		▪				▪	9072	0.3	1	84.9
65	60		Chuck Bean	Heritage Financial Services	Westwood, Mass.	▪	▪	▪				1255	2	3	84.7
66	71		Randy Carver	Raymond James	Mentor, Ohio	▪	▪		▪			1193	1	1.6	84.6
67	63		Pamela Rosenau	HighTower	Los Angeles, Calif.	▪	▪	▪				1067	10	30	84.6
68	70		Rick Buoncore	MAI Capital Management	Cleveland, Ohio	▪	▪	▪				4295	10	25	84.5
69	64		Jim Berliner	Westmount Asset Management	Los Angeles, Calif.	▪	▪	▪				2691	3	8	84.5
70	45		Robert Fragasso	Fragasso Financial Advisors	Pittsburgh, Pa.	▪	▪	▪	▪		▪	1252	0.9	1.8	84.5
71	58		Erin Scannell	Ameriprise Financial	Mercer Island, Wash.	▪	▪					1698	0.3	1	84.4
72	68		William Cafero	RCL Advisors	New York, N.Y.		▪	▪				1798	10	48	84.4
73	95		Glenn Degenaars	First Republic Investment Management	New York, N.Y.		▪	▪				9513	10	15	84.3
74	80		Debra Wetherby	Wetherby Asset Management	San Francisco, Calif.		▪	▪				4700	25	40	84.3
75	N		Michael Genovese	Genovese Burford & Brothers	Sacramento, Calif.	▪	▪	▪			▪	3505	0.9	2.5	84.2
76	73		Kevin Myeroff	NCA Financial Planners	Cleveland, Ohio	▪	▪	▪	▪			1457	3	5	84.2
77	82		John Lesser	Plante Moran Financial Advisors	Auburn Hills, Mich.		▪	▪				12804	21.1	91	84.2
78	38		Mark Orgel	Orgel Wealth Management	Altoona, Wis.	▪	▪	▪			▪	4246	2.2	6	84.1
79	N		Matthew Dillig	HighTower	Chicago, Ill.			▪				1600	35	50	84.1
80	96		Andrew Rand	Rand & Associates	San Francisco, Calif.	▪	▪	▪	▪			1150	3.5	6	84
81	47		John Henry	OBS Financial Services	Perrysburg, Ohio	▪	▪				▪	1717	0.3	1	83.9
82	88		Paul C Carbetta II	Ameriprise Financial	Worthington, Ohio	▪	▪					3331	0.5	1.6	83.8
83	81		Matthew Young	Richard C. Young & Co.	Newport, R.I.	▪	▪	▪				1045	1.8	5	83.8
84	66		Scott Tiras	Ameriprise Financial	Houston, Texas	▪	▪	▪				1728	2	4	83.8
85	89		James Meredith	Hefren-Tillotson	Pittsburgh, Pa.	▪	▪	▪			▪	1525	1.2	4.2	83.7
86	N		Santiago Ulloa	WE Family Offices	Miami, Fla.			▪				6465	198	198	83.6
87	N		Ronald Weiner	HighTower	Westport, Conn.	▪	▪	▪			▪	788	3.5	7	83.5
88	N		Paul Kropatsch	Ameriprise Financial	Thornton, Colo.	▪	▪					1311	0.4	1.3	83.3
89	91		Kevin VanDyke	Bloomfield Hills Financial	Bloomfield Hills, Mich.	▪	▪				▪	1131	2	4	83.3
90	N		Wes Moss	Capital Investment Advisors	Atlanta, Ga.	▪	▪					1932	1.4	2.3	83.3
91	84		Andy Berg	Homrich Berg	Atlanta, Ga.	▪	▪	▪			▪	4720	3	7	83.2
92	74		Malcolm Makin	Raymond James	Westerly, R.I.	▪	▪	▪			▪	1188	1.5	3	83.2
93	85		George Papadoyannis	Ameriprise Financial	San Mateo, Calif.	▪	▪	▪				4500	2	7.5	83.2
94	87		Van Pearcy	Raymond James	Midland, Texas	▪	▪	▪			▪	1507	3	10	83.1
95	92		Joseph Jacques	Jacques Financial	Rockville, Md.	▪	▪				▪	734	0.8	1.5	83.1
96	N		Dalal Salomon	Wells Fargo Advisors Financial Network	Richmond, Va.	▪	▪	▪				1066	5	15	83.1
97	78		Wally Obermeyer	Obermeyer Wood Investment Counsel	Aspen, Colo.	▪	▪	▪				1560	3	10	83
98	N		Stephen Thomas	Linden Thomas & Co.	Charlotte, N.C.	▪	▪	▪	▪	▪	▪	1372	3	7	82.9

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99	N		Leo Marzen	Bridgewater Advisors	New York, N.Y.	▪	▪	▪				1305	5	10	82.7
100	N		Darrell Pennington	Ameriprise Financial	Houston, Texas	▪	▪					971	1.5	2.5	82.7