The 150 best financial advisers for doctors: Our exclusive list

Don't trust your nest egg to just anyone. These advisers have the expertise you deserve.

Nov 3, 2006
By: Dennis Murray
Medical Economics

Congratulations! The fact that you've turned to this article probably means you've amassed enough of a nest egg to want to put it in capable hands. And not just with any financial adviser, but with someone who has experience working with doctors and the issues particular to them.

This article is designed to help you find just such a person. We've done the hard work of searching the country for the best financial advisers for doctors. Our editors have spent the better part of six months gathering names of potential candidates. In addition to mailing questionnaires to the advisers who made our previous list (which was published in 2004), we contacted advisers recommended to us by financial planning professional societies, as well as those who received praise from readers like you, whom we solicited with an open call for nominations earlier this year.

Over the summer, our mailboxes were filled with hundreds of completed questionnaires, detailing advisers' credentials, education, areas of expertise, total amount of assets under management, percentage of physician clients, noteworthy professional achievements, and affiliations with medical organizations. Some advisers, we found, serve on hospital boards; others have a spouse or child who's a doctor. A few of them are physicians, who left the day-to-day practice of medicine to maintain their clients' financial health.

To whittle down our list of candidates, we gave preference to those who came recommended to us by your colleagues and those who limit the percentage of compensation they earn from commissions. Commissions, we feel, can predispose an adviser to steer you toward a financial product that may be better for him (in terms of income) than it is for you. That's certainly not always the case, of course, but the odds that you'll receive unbiased advice are greater if you use a "fee-only" planner, one who makes no money from commissions.

As was the case when we published our list two years ago, we received multiple nominations from the same firm or brokerage. However, to give us the broadest geographic reach—we wanted at least one adviser in each state—we made the tough decision to limit our selections to one adviser per firm, even though many firms nominated several qualified partners. By the way, don't hesitate to call an adviser just because his place of business isn't near you; most advisers are willing to travel considerable distances to meet with their clients.

Last, but not least, we ran each adviser's name though the NASD and SEC databases, to be sure he or she hadn't been found guilty of any wrongdoing. That's comforting to you, of course, but it doesn't preclude the possibility that a state securities office may have a beef with an adviser; we didn't drill down that far.

Almost every adviser we chose has some sort of specialized financial planning credentials in addition to an undergraduate degree and, in some cases, an advanced degree (MBAs, for instance, are common to our list). Three credentials that you'll see often on the list are related to investing and comprehensive planning: Certified Financial Planner (CFP), Chartered Financial Consultant (ChFC), and Chartered Financial Analyst (CFA). A couple of others—Certified Public Accountant (CPA) and Chartered Life Underwriter (CLU)—indicate people who can take care of your tax and insurance needs as well as your investment portfolio. One other credential you'll see is CPA/PFS, which is an accountant who specializes in personal financial planning.

To maintain these credentials and keep their knowledge current, these professionals may be required to take continuing education. There's comfort in that, too.

The majority of the advisers on our exclusive list will manage your money for you; others will create an investment plan and make recommendations, but leave the execution to you. As you'll see, most of the folks on our list require a minimum amount of investment assets before they'll accept you as a client. Those minimums can run as high as $1 million, but many advisers are open to smaller amounts if you're serious about investing and committed to saving regularly. We gave preference, however, to advisers with small minimums or none at all. In any case, you should always ask what fees are involved to manage your assets; even advisers that require no minimums may charge annual retainers of many thousands of dollars a year.

Finally, always meet the adviser in person before you agree to invest. It's important for both parties to determine if your personalities mesh and whether you'll be able to communicate well with one another. Does the adviser listen closely to your questions, and to your spouse's?
Does he or she have other physician-clients with situations similar to yours? You can find basic information about the adviser, his team, his investment philosophy, and his services from his website—even most advisers in small firms have a website. For instance, you may want only a detailed financial plan, for which you pay a flat rate or an hourly fee, before agreeing to entrust the adviser with a portion or all of your assets.

Kathleen McKee, a former senior editor of this magazine, contributed to this article.

<table>
<thead>
<tr>
<th>150 best financial advisers, by state</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ALABAMA</strong></td>
</tr>
<tr>
<td>Robert A. Studin, JD, CFP, CPA/PFS, ChFC, CLU</td>
</tr>
<tr>
<td>First Financial Group/Lincoln Financial Advisors</td>
</tr>
<tr>
<td>Birmingham</td>
</tr>
<tr>
<td>205-803-3333</td>
</tr>
<tr>
<td><a href="mailto:rob.studin@lfg.com">rob.studin@lfg.com</a></td>
</tr>
</tbody>
</table>

| **ARIZONA**                           |
| John A. Bagley, MBA, CFP, CPA         |
| Strategic Wealth Advisors             |
| Scottsdale                            |
| 480-998-1798                          |
| [www.xpertadvice.com](http://www.xpertadvice.com) |
| Minimum portfolio: $750,000            |

| Patricia F. Raskob, CFP               |
| Raskob Kambourian Financial Advisors  |
| Tucson                                |
| 520-690-1999                          |
| [www.rkfin.com](http://www.rkfin.com)  |

| **ARKANSAS**                          |
| Fredrick E. Adkins III, MBA, CFP, ChFC, CLU |
| The Arkansas Financial Group           |
| Little Rock                           |
| 501-376-9051                          |
| [www.arfinancial.com](http://www.arfinancial.com) |

| J. Ralph Broadwater, MD, CFP          |
| Physician Advisory Resources         |
| Little Rock                           |
| 501-247-4459                          |
| [www.physicianadvres.com](http://www.physicianadvres.com) |

| **CALIFORNIA**                        |
| James E. Berliner, JD                 |
| Westmount Asset Management            |
| Los Angeles                           |
| 310-556-2502                          |
| [www.westmount.com](http://www.westmount.com) |
| Minimum portfolio: $500,000            |

| Norman M. Boone, MBA, CFP             |
| Mosaic Financial Partners             |
| San Francisco                         |
| 415-788-1952                          |
| [www.mosaicfp.com](http://www.mosaicfp.com) |
| Minimum portfolio: $1 million         |
James M. Casey  
Physicians' Asset Management  
Marina del Rey  
310-821-3332; 800-852-3284  
[www.physassetmgmt.com](http://www.physassetmgmt.com)  
Minimum portfolio: $1 million

Sherman L. Doll, CPA/PFS  
Capital Performance Advisors  
Walnut Creek  
925-938-5188  
[www.cpacapital.com](http://www.cpacapital.com)  
Minimum portfolio: $1 million

Jeffrey D. Lancaster, CFP  
Bingham, Osborn & Scarborough  
San Francisco  
415-781-8535  
[www.bosinvest.com](http://www.bosinvest.com)  
Minimum portfolio: $1 million

Carlo A. Panaccione, CFP  
Navigation Group  
Redwood Shores  
650-595-1700  
[www.navigationgroup.com](http://www.navigationgroup.com)  
Minimum investment: $1 million

Stefan Prvanov, CFP  
Blankinship & Foster  
Solana Beach  
858-755-5166  
[www.bfadvisers.com](http://www.bfadvisers.com)  
Minimum portfolio: $1 million

Edwin K. S. Ryu, CPA/PFS  
Legacy Wealth Advisors  
San Jose  
408-452-7700  
[www.lwallc.com](http://www.lwallc.com)  
Minimum portfolio: $1 million

Paul R. Temby, MBA, CFP, CFA  
Dowling & Yahnke  
San Diego  
858-509-9500  
[www.dyinc.com](http://www.dyinc.com)  
Minimum portfolio: $1 million

Bob Wacker, CFP  
R.E. Wacker Associates  
San Luis Obispo  
805-541-1308  
[www.rewacker.com](http://www.rewacker.com)

COLORADO

Craig Evans Carnick, CFP  
Carnick & Company  
Colorado Springs  
719-579-8000; 800-447-8181  
[www.carnick.com](http://www.carnick.com)  
Minimum portfolio: $250,000

Dave Forbes, CFP, CFA  
Petra Financial Advisors  
Colorado Springs  
719-636-9000  
Minimum portfolio: $1 million
Lawrence E. Howes, MBA, CFP
Sharkey, Howes & Javer
Denver
303-639-5100
www.shwj.com

CONNECTICUT

John W. Eckel, MBA, CFP, CFA
Pinnacle Investment Management
Simsbury
860-651-1716
www.pinninvest.com
Minimum portfolio: $250,000

Kathryn K. Norris, CFP
Asset Strategies
Avon
860-673-5500
www.asset-strategies-inc.com
Minimum portfolio: $750,000

Bryan M. Place, CFP, ChFC, CLU
Place Financial Advisors
Farmington
888-693-8390
www.placefinancial.com
Minimum portfolio: $200,000

Alan P. Weiss, CFP, CPA/PFS
Regent Wealth Management Group
Woodbridge
800-443-3101
www.regentwealth.com
Minimum portfolio: $1 million

DELAWARE

Judith W. Lau, CFP
Lau Associates
Wilmington
302-792-5955
www.lauassociates.net
Minimum portfolio: $1 million

Michael J. Sicuranza, CFP
Investment Management & Planning
Greenville
302-654-5449
www.imandp.com
Minimum portfolio: $250,000

FLORIDA

Michael H. Davis, JD, CFP, CPA
Resource Consulting Group
Orlando
407-422-0252
www.resourceconsulting.com
Minimum portfolio: $1 million

Roy T. Diliberto, CFP, ChFC, CLU
RTD Financial Advisors
Bonita Springs
800-893-4725
www.rtdfinancial.com

Austin A. Frye, JD, MBA, CFP
Frye Financial Center
Aventura
305-931-3200
www.401ksave.com
Minimum portfolio: $250,000

Linda S. Lubitz, CFP
The Lubitz Financial Group
Miami
305-670-4440
www.lubitzfinancial.com
Minimum portfolio: $1 million

Edward H. Maass, CFP, ChFC, CLU
Physicians Wealth Care
Delray Beach
561-272-0663
www.physicianswealthcare.com
Minimum portfolio: $500,000

Timothy J. McIntosh, MBA, CFP
Strategic Investment Partners
Tampa
813-973-1100
www.sipllc.com
Minimum portfolio: $100,000

Margery K. Schiller, CFP
Goar, Endrias & Walker
Sarasota
941-366-6380
www.gewcpa.com

Marc Singer, MBA, CFP
Singer Xenos Wealth Management
Coral Gables
305-443-0060; 888-289-0060
www.singerxenos.com
Minimum portfolio: $500,000

Benjamin A. Tobias, CFP, CPA/PFS
Tobias Financial Advisors
Plantation
954-424-1660
www.tobiasfinancial.com

Robert B. Wolfe, CFP
Capital Planning Group
Fort Lauderdale
305-717-6064
rbwolfe@finsvcs.com
Minimum portfolio: $1 million

GEORGIA

Wesley D. Bigler, MBA, CFP
Financial Network
Atlanta
404-843-3100
www.financialnetworkcorp.com
Minimum portfolio: $750,000

B. William Cleveland III, MBA, CFP, CPA/PFS
Preston & Cleveland Wealth Management
Augusta
706-855-0170
www.preston-cleveland.com
Minimum portfolio: $500,000

Robert S. Hockett, CFP
Cambridge Southern Financial Advisors
Atlanta
404-388-3015; 866-333-2384
www.cambridgesouthern.com

Robert “Buzz” W. Law, CFP
Creative Financial Group
Atlanta
770-913-9704
www.cfgltd.com

David W. Polstra, CFP, CPA/PFS
Brightworth
Norcross
770-368-1700
www.brightworth.com
Minimum portfolio: $1 million

HAWAII

F. Dennis De Stefano, CFP, CPA
De Stefano Wealth Management
Kihei, Maui
808-879-0454
www.dwm.biz
Minimum portfolio: $400,000

Harry G. Kasanow, CFP
Kasanow & Associates: Wealth Management
Honolulu
808-988-1311
www.kasanowandassociates.com
Minimum portfolio: $1 million

ILLINOIS

Curt A. Anderson, CFP
First Busey Securities
Champaign
217-365-4870
canderson@busey.com
Minimum portfolio: $100,000

Mark E. Balasa, CFP, CPA
Balasa Dinverno & Foltz
Itasca
630-875-4903
www.bdflc.com
Minimum portfolio: $1 million

Michael Kabarec, CFP, CPA/PFS
Kabarec Financial Advisors
Palatine
847-934-7777
www.kabarec.com
Minimum portfolio: $500,000

Michael E. Leonetti, CFP
Leonetti & Associates
Buffalo Grove
847-520-0999; 800-454-0999
www.leonettiaassoc.com
Minimum portfolio: $200,000

Mary F. McGrath, CFP, CPA
Cozad Asset Management
Champaign
217-356-8363
www.cozadassetmgmt.com
Minimum portfolio: $250,000

**Thomas A. Muldowney, CFP, ChFC, CLU**
Savant Capital Management
Rockford
815-227-0300
[www.savantcapital.com](http://www.savantcapital.com)

Ronald J. Paprocki, JD, CFP
Mediqus Asset Advisors
Chicago
312-419-3733
[www.mediqus.com](http://www.mediqus.com)
Minimum portfolio: $500,000

**INDIANA**

Elaine E. Bedel, MBA, CFP
Bedel Financial Consulting
Indianapolis
317-843-1358
[www.bedelfinancial.com](http://www.bedelfinancial.com)
Minimum portfolio: $500,000

Richard L. Bellmer, CFP, CLU
Deerfield Financial Advisors
Indianapolis
317-469-2455
[www.deerfieldfa.com](http://www.deerfieldfa.com)

Greg Galecki, CFP
Galecki Financial Management
Fort Wayne
260-436-8525
[www.galecki.com](http://www.galecki.com)
Minimum portfolio: $500,000

**IOWA**

Donald G. DeWaay, CFP
DeWaay Capital Management
West Des Moines
515-224-9861; 800-722-9861
[www.theprofitzone.net](http://www.theprofitzone.net)
Minimum portfolio: $250,000

Jerry R. Foster, CFP
Foster Group
West Des Moines
515-226-9000; 800-798-1012
[www.fostergrp.com](http://www.fostergrp.com)
Minimum portfolio: $1 million

**KANSAS**

Peter Mallouk, JD, MBA, CFP
Creative Planning
Overland Park
913-338-2727
[www.thinkingbeyond.com](http://www.thinkingbeyond.com)
Minimum portfolio: $250,000

Michael J. Searcy, CFP, ChFC, CLU
Searcy Financial Services
Overland Park
913-814-3800
[www.searcyfinancial.com](http://www.searcyfinancial.com)
Minimum portfolio: $1 million
Kathy Stepp, CFP, CPA/PFS  
Stepp & Rothwell  
Overland Park  
913-345-4800  
www.steppandrothwell.com

KENTUCKY

Gregory W. Kasten, MD, MBA, CFP  
Unified Trust  
Lexington  
859-296-4407, ext. 202  
www.unifiedtrust.com  
Minimum portfolio: $50,000

LOUISIANA

John Hixson, CFP, ChFC  
Financial Management Professionals  
Lake Charles  
337-433-4334  
www.fmprofessionals.com  
Minimum portfolio: $100,000

T. Craig Lewis III, CFP, CPA  
Lewis Financial Group  
Shreveport  
318-797-0447  
www.lewisfinancialgroup.com

MARYLAND

Jonathan S. Dinkins, CPA/PFS  
Glass Jacobson Investment Advisors  
Owings Mills  
410-356-1000; 800-356-7666  
www.glassjacobson.com  
Minimum portfolio: $100,000

Peg Downey, CFP  
Money Plans  
Silver Spring  
301-569-4250  
www.moneyplans.com  
Minimum portfolio: $300,000

Christopher P. Parr, MBA, CFP  
Financial Advantage  
Columbia  
410-715-9200  
www.financialadvantageinc.com  
Minimum portfolio: $800,000

Edward A. Ramsey, MBA, CFP, CPA  
Centerpiece Financial Planning  
Greenbelt  
301-220-1973  
www.centerpiecefinancialplanning.com  
Minimum portfolio: $50,000

MASSACHUSETTS

Linda B. Gadkowski, CFP  
Beacon Financial Planning  
Centerville  
508-362-7039  
www.beaconfinancialplanning.com
Susan C. Kaplan, MBA, CFP
Kaplan Financial Services
Newton
617-527-1557
kaplanfin@aol.com
Minimum portfolio: $1 million

Eric M. Kobren, MBA
Kobren Insight Management
Wellesley Hills
617-369-2200
www.kobreninsightmanagement.com
Minimum portfolio: $250,000

Thomas J. McFarland III, CFP
The Darrow Company
Concord
978-369-5144
www.darrowwealthmanagement.com
Minimum portfolio: $1 million

Pran N. Tiku, CFP, ChFC
Peak Financial Management
Waltham
781-487-9500
www.peak-financial.com
Minimum portfolio: $500,000

MICHIGAN

Marilyn M. Gunther, CFP
Center for Financial Planning
Southfield
248-948-7900
www.centerfinplan.com
Minimum portfolio: $500,000

Sherri Stephens
Stephens Wealth Mgt Group
Flint
810-732-7411
www.stephenswealthmgtgroup.com
Minimum portfolio: $500,000

MINNESOTA

Joel Greenwald, MD, CFP
Affiance Financial
Minnetonka
952-253-2578; 800-570-2941
www.affiancefinancial.com

Robert J. Klosterman, CFP, ChFC, CLU
White Oaks Wealth Advisors
Minneapolis
612-455-6900
www.whiteoakswealth.com
Minimum portfolio: $1 million

Ross Levin, CFP
Accredited Investors
Edina
952-841-2222
www.accreditedinvestors.com
Minimum portfolio: $1 million

Sharon Olson, CFP
Olson Weiss
Bloomington
Robert A. Steffen, CFP
Robert Steffen and Associates
Bloomington
952-884-7700
www.robertsteffen.com
Minimum portfolio: $300,000

Jerry B. Wade, CFP
Wade Financial Group
Minneapolis
763-797-9577
www.wadefinancialgroup.com
Minimum portfolio: $100,000

MISSISSIPPI

Tim C. Medley, CFP
Medley & Brown
Ridgeland
601-982-4123
www.medleybrown.com
Minimum portfolio: $500,000

MISSOURI

M. Eileen Dorsey, MBA, CFP
Money Consultants
St. Louis
314-963-9813
medorsey@swbell.net

Emmett F. Owenby III, MBA
Morgan Stanley
St. Louis
314-889-9812; 800-488-9880
demett.owenby@morganstanley.com
Minimum portfolio: $250,000

MONTANA

Robert M. Frey, CFP, CLU
Professional Financial Management
Bozeman
406-587-1604
bob.pfm@bridgeband.com
Minimum portfolio: $100,000

NEBRASKA

J.A. Abels, CFP
Family Estate Planning
Papillion
402-331-1429
www.familyestateplanning.com

NEW HAMPSHIRE

Stephen A. Brophy, CFP, CPA/PFS, ChFC, CLU
Brophy Financial Advisory Group
Bedford
603-668-2303
www.brophyfinancialadvisory.com
NEW JERSEY

Steven W. Kaye, CFP, ChFC, CLU
American Economic Planning Group
Watchung
908-757-5600
www.aepg.com
Minimum portfolio: $750,000

Ram Kolluri, MBA, CFP
Global Investment Management
Princeton
609-452-2929
www.gimgt.com
Minimum portfolio: $500,000

Diahann W. Lassus, CFP, CPA/PFS
Lassus Wherley
New Providence
908-464-0102
www.lassuswherley.com

Thomas A. Orecchio, CFP, CFA, ChFC, CLU
Greenbaum and Orecchio
Old Tappan
201-768-4600
www.investmentcounsel.com
Minimum portfolio: $1 million

Harry Scheyer, CFP, CPA/PFS
Pinnacle Financial Advisors
Marlton
856-797-8082, ext. 223
www.pfacentral.com
Minimum portfolio: $1 million

David K. Sebastian, CFP
The Physicians Wealth Management Group
Parsippany
973-202-8729
www.physicianswealth.com
Minimum portfolio: $500,000

Eleanore K. Szymanski, CFP
EKS Associates
Princeton
609-921-1016
eksassoc@erols.com

Albert J. Zdenek Jr., MBA, CPA/PFS
Zdenek Financial Planning
Flemington
908-782-1600
www.zdenek.com
Minimum portfolio: $1 million

NEW MEXICO

Virginia M. K. Stanley, CFP, CPA/PFS
REDW Stanley Financial Advisors
Albuquerque
505-998-3216
www.redw.com
Minimum portfolio: $1 million

NEW YORK

Lewis J. Altfest, MBA, CFP, CFA, CPA/PFS
L.J. Altfest & Co.
New York
212-406-0850
www.altfest.com
Minimum portfolio: $500,000

Joel S. Isaacson, MBA, CFP, CPA/PFS
Joel Isaacson & Co.
New York
212-302-6300
www.joelisaacson.com
Minimum portfolio: $1 million

Raymond D. Mignon, CFP
Ray Mignon & Co.
Little Neck
718-229-2514
www.raymignon.com
Minimum portfolio: $1 million

Anthony J. Ogorek, CFP
Ogorek Wealth Management
Williamsville
716-626-5000
www.ogorek.com

Ronald W. Rogé, CFP
R.W. Rogé & Co.
Bohemia
631-218-0077
www.rwroge.com
Minimum portfolio: $1 million

Gary H. Schatsky, JD
The ObjectiveAdvice Group
New York
212-721-8713
Albany
518-438-6566
www.objectiveadvice.com

NORTH CAROLINA

Giles K. Almond, CFP, CPA/PFS
Matrix Wealth Advisors
Charlotte
800-493-3323
www.matrixwealth.com
Minimum portfolio: $500,000

Christopher C. Angelino
The Lake Norman Group at Citigroup Smith Barney
Cornelius
800-966-4581; 704-655-1130
chris.angelino@smithbarney.com
Minimum portfolio: $500,000

Wm. Barton "Bart" Boyer, CFP
Parsec Financial
Asheville
888-877-1012
www.parsecfinancial.com
Minimum portfolio: $125,000
Kenneth B. Frenke, CFP
Kenneth Frenke & Co.
Arden
828-654-9343
www.frenke.com

Frederick F. Kramer IV, JD
Wealth Advisor Group
Asheville
828-692-3023
www.wealthadvisorgroup.com
Minimum portfolio: $250,000

Peter H. Langer, CFP
Langer Wealth Management
Wilmington
910-256-6521
www.langerwealth.com
Minimum portfolio: $1 million

OHIO

Michael J. Chasnoff, CFP
Truepoint Capital
Cincinnati
513-792-6648
www.truepointcapital.com

William D. Heichel, JD, CFP
Pinnacle Wealth Planning Services
Mansfield
800-987-4767
billh@lpipinnacle.com
Minimum portfolio: $250,000

William A. Leuby, JD, CFP, CPA
Hamilton Capital Management
Columbus
614-273-1000
www.hamiltoncapital.com
Minimum portfolio: $500,000

Jason M. O'Dell
The O'Dell Group
Cincinnati
513-791-7525
www.odellgroup.net

Peggy Ruhlin, CFP, CPA/PFS
Budros, Ruhlin & Roe
Columbus
614-481-6900
www.b-r-f.com
Minimum portfolio: $500,000

Ted K. Saneholtz, CFP, CPA/PFS, ChFC
Summit Financial Strategies
Columbus
614-885-1115
www.summitfin.com
Minimum portfolio: $250,000

Eugene E. Welsh Jr., CPA/PFS
Professional Management
Strongsville
440-572-5522
www.professionalmanagementinc.com

OKLAHOMA
Doane F. Harrison, MBA, CPA/PFS  
Harrison Financial Services  
Norman  
405-329-3110  
www.harrisonfinancialservices.com  
Minimum portfolio: $250,000

Jana L. Shoulders, CPA  
Adams Hall Investment Management  
Tulsa  
918-665-2446  
www.adamshall.com  
Minimum portfolio: $100,000

OREGON

Marilyn R. Bergen, CFP  
CMC Advisers  
Portland  
503-227-5284  
www.cmcavisers.com  
Minimum portfolio: $1 million

Kathleen J. Kee, CFP  
Pacific Investment Advisors  
Portland  
503-221-7535  
www.piainvest.com  
Minimum portfolio: $750,000

Ron Kelemen, CFP  
The H Group  
Salem  
503-371-3333; 800-285-6240  
www.thehgroup-salem.com  
Minimum portfolio: $500,000

PENNSYLVANIA

David A. Burd, CFP  
TGS Financial Advisors  
Media  
610-892-9900  
www.tgsfinancial.com  
Minimum portfolio: $1 million

Ronald P. Dreese, CPA/PFS  
Abundance Wealth Counselors  
State College  
814-272-2070  
www.abundancellc.com  
Minimum portfolio: $1 million

James D. Hohman, CFP  
Allegheny Financial Group  
Pittsburgh  
412-367-3880  
www.alleghenyfinancial.com  
Minimum portfolio: $250,000

James J. Holtzman, CFP, CPA  
Legend Financial Advisors  
Pittsburgh  
412-635-9210  
www.legend-financial.com  
Minimum portfolio: $1 million

John M. Sklenar  
AIG Advisor Group/FSC Securities  
Plymouth Meeting
RHODE ISLAND

Malcolm A. Makin, CFP
Professional Planning Group
Westerly
401-596-2800
www.profplan.com
Minimum portfolio: $1 million

SOUTH CAROLINA

Marsha G. LePhew, CFP, CPA/PFS, ChFC
LePhew Financial Services
Rock Hill
803-329-5125
marsha@lephew.com

Bill Prewitt, CFP
Charleston Financial Advisors
Charleston
843-722-3331
www.charlestonfinancial.net
Minimum portfolio: $250,000

James E. Wilson, CFP
J.E. Wilson Advisors
Columbia
803-799-9203
www.jewilson.com
Minimum portfolio: $1 million

TENNESSEE

Paul K. Fain III, CFP
Asset Planning Corp.
Knoxville
888-690-1231
www.assetplanningcorp.com
Minimum portfolio: $500,000

Martha Moore Hobson, CFP
Hobson Yoder Financial Group
Oak Ridge
865-481-0045
www.hobsonyoder.com
Minimum portfolio: $100,000

William B. Howard Jr., CFP, ChFC
William Howard & Co. Financial Advisors
Memphis
901-761-5068
www.whcfa.com
Minimum portfolio: $500,000

John W. Ueleke, MBA, CFP, ChFC, CLU
Legacy Wealth Management
Memphis
888-526-8554; 901-758-9006
www.legacywealth.com
Minimum portfolio: $500,000

TEXAS
Janet Briaud, CFP
Briaud Financial Planning
Bryan
979-260-9771
www.briaud.com
Minimum portfolio: $750,000

David H. Diesslin, MBA, CFP
Diesslin & Associates
Fort Worth
817-332-6122
www.diesslin.com

Steven P. Kanaly, CFP
Kanaly Trust Company
Houston
713-561-9350
www.kanaly.com
Minimum portfolio: $250,000

James R. Waters, MBA, CFP
PartnersInWealth
Houston
713-964-4028
www.partnersinwealth.com

UTAH

John Q. Bird, MBA, CFP, CFA
Albion Financial Group
Salt Lake City
801-487-3700
www.albionfinancial.com
Minimum portfolio: $1 million

Kent L. Wilson, CFP, CPA
Wilson Financial Advisors
Salt Lake City
801-355-5210
www.wilsonfeeonly.com
Minimum portfolio: $300,000

VIRGINIA

Michael Joyce, MBA, CFP, CFA
Michael Joyce & Associates
Richmond
804-358-2702
www.mjoyce.com
Minimum portfolio: $500,000

Glenn Kautt, MBA, CFP
The Monitor Group
McLean
703-288-0500
www.themonitorgroup.com
Minimum portfolio: $1 million

William R. Lloyd, CFP, ChFC
The Financial Internist
Vienna
703-394-7197
www.financialinternist.com

James E. Pearman Jr., CFP, CPA/PFS
Fee-Only Financial Planning
Roanoke
540-342-7102
www.feeonlyroanoke.com
Ronald L. West, CFP
West Financial Services
McLean
703-847-2500
www.westfinancial.com
Minimum portfolio: $1 million

WASHINGTON

Terrence E. Burns, JD, CFP
Wells Fargo Investments
Bellevue
425-450-8011
terryb@wellsfargo.com
Minimum portfolio: $500,000

Michael D. Joslin, CPA
Joslin Capital Advisors
Bellevue
425-888-0555; 877-688-0555
www.joslincapital.com
Minimum portfolio: $1 million

Richard Millar, MBA, CFP
Dempsey Financial Services
Olympia
360-352-9560
www.richardmillarcfp.com

Gregory T. Stapp, CFP, CPA/PFS
Stapp Financial Planning
Olympia
360-754-8895
www.stappfinancial.com
Minimum portfolio: $100,000

WEST VIRGINIA

Archibald R. "Rob" Hoxton IV, CFP
Hoxton Financial
Shepherdstown
304-876-2619
www.hoxtonfinancial.com
Minimum portfolio: $500,000

WISCONSIN

Todd D. Bramson, CFP, ChFC, CLU
Marathon Advisors
Madison
888-655-8092, ext. 218
todd.bramson@northstarfinancial.com

William R. Casey, CFP, ChFC, CLU
Access Investment Advisors
Manitowoc
920-683-9901
www.accessinvestmentadvisors.com
Minimum portfolio: $300,000

Paula H. Hogan, CFP, CFA
Hogan Financial Management
Milwaukee
414-352-9111
www.hoganfinancial.com

James E. Putnam, CFP
Wealth Management
WYOMING

Connie Brezik, CFP, CPA/PFS
Asset Strategies
Casper
307-266-4525
www.asset-strategies-inc.com
Minimum portfolio: $750,000