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## 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 Investment Management	Menlo Park, Calif.	▪	▪	▪	▪	▪	12850	40	100	94.9
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	LWV Advisors	Pittsford, N.Y.	▪	▪	▪	▪	▪	4521	50	75	93.8
27	26		Steven Weinstein	Altair Advisors	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	<b>Gary Ran</b>	Telemus Capital Partners	Southfield, Mich.	▪	▪	▪	▪	2010	3.9	18	92
38	43	<b>Mark Orgel</b>	Orgel Wealth Management	Altoona, Wis.	▪	▪	▪	▪	3772	2.5	5	92
39	42	<b>Kevin Timmerman</b>	Steele Capital Management	Dubuque, Iowa	▪	▪	▪	▪	1624	0.7	3	91.7
40	45	<b>Robert Balentine</b>	Balentine	Atlanta, Ga.	▪	▪	▪	▪	2373	16	25	91.7
41	44	<b>James B. Stack</b>	Stack Financial Management	Whitefish, Mont.	▪	▪	▪	▪	1125	1.5	5	91.3
42	56	<b>David Wright</b>	The Sierra Investment Management	Santa Monica, Calif.	▪	▪	▪	▪	1661	2	3	91.1
43	60	<b>Michael Chasnoff</b>	Truepoint Wealth Counsel	Cincinnati, Ohio	▪	▪	▪	▪	2168	5	8	90.6
44	53	<b>Gerard Klingman</b>	Klingman & Assocs.	New York, N.Y.	▪	▪	▪	▪	1706	10	15	90.6
45	57	<b>Robert Fragasso</b>	Fragasso Financial Advisors	Pittsburgh, Pa.	▪	▪	▪	▪	1117	0.9	1.7	90.2
46	30	<b>Jonathan Kuttin</b>	Ameriprise Financial	Melville, N.Y.	▪	▪	▪	▪	1405	1	3.9	90.1
47	73	<b>John Henry</b>	OBS Financial Services	Whitehouse, Ohio	▪	▪	▪	▪	2132	0.5	1	90.1
48	64	<b>Brian Holmes</b>	Signature Estate & Investment Advisors	Los Angeles, Calif.	▪	▪	▪	▪	5490	8	21	90.1
49	N	<b>John M. Krambeer</b>	Camden Capital	El Segundo, Calif.	▪	▪	▪	▪	1621	15	30	86
50	N	<b>Alex Shahidi</b>	Advanced Research Investment Solutions	Beverly Hills, Calif.	▪	▪	▪	▪	10198	20	25	85.9
51	N	<b>Roger Wade</b>	GW & Wade	Wellesley, Mass.	▪	▪	▪	▪	5341	0.7	2.4	85.8
52	47	<b>Clarke Lemons</b>	WaterOak Advisors	Winter Park, Fla.	▪	▪	▪	▪	1493	3	5	85.6
53	69	<b>Daniel Wiener</b>	Adviser Investments	Newton, Mass.	▪	▪	▪	▪	3343	0.5	1.2	85.6
54	59	<b>Lewis Altfest</b>	Altfest Personal Wealth Management	New York, N.Y.	▪	▪	▪	▪	1127	2	4	85.4
55	38	<b>John Waldron</b>	Waldron Private Wealth	Pittsburgh, Pa.	▪	▪	▪	▪	1324	10	25	85.4
56	46	<b>Daniel Roe</b>	Budros Ruhlin & Roe	COLUMBUS, Ohio	▪	▪	▪	▪	2192	3.5	4.5	85.3
57	51	<b>William Rice</b>	Anchor Capital Advisors	Boston, Mass.	▪	▪	▪	▪	8315	2	5	85.3
58	81	<b>Erin Scannell</b>	Ameriprise Financial	Mercer Island, Wash.	▪	▪	▪	▪	1724	1.5	5	85.2
59	N	<b>Jordan Waxman</b>	HighTower	New York, N.Y.	▪	▪	▪	▪	2000	25	50	85.2
60	70	<b>Chuck Bean</b>	Heritage Financial Services	Westwood, Mass.	▪	▪	▪	▪	1039	2	3	85
61	87	<b>Charles Brighton</b>	Brighton Jones	Seattle, Wash.	▪	▪	▪	▪	3321	3	4	84.7
62	89	<b>Jon Jones</b>	Brighton Jones	Seattle, Wash.	▪	▪	▪	▪	3321	3	4	84.7
63	75	<b>Pamela Rosenau</b>	HighTower	Los Angeles, Calif.	▪	▪	▪	▪	1023	7	25	84.7
64	52	<b>Jim Berliner</b>	Westmount Asset Management	Los Angeles, Calif.	▪	▪	▪	▪	2393	2.8	8	84.7
65	N	<b>Charles Simmons</b>	Ameriprise Financial	Metairie, La.	▪	▪	▪	▪	1734	0.8	1.8	84.7
66	82	<b>Scott Tiras</b>	Ameriprise Financial	Houston, Texas	▪	▪	▪	▪	2264	2	3.5	84.6
67	77	<b>Lawrence Hood</b>	Pacific Portfolio Consulting	Seattle, Wash.	▪	▪	▪	▪	2828	11	18.3	84.5
68	71	<b>William Cafero</b>	RCL Advisors	New York, N.Y.	▪	▪	▪	▪	1562	16.5	54	84.5
69	88	<b>Richard S. Brown</b>	JNBA Financial Advisors	Minneapolis, Minn.	▪	▪	▪	▪	1173	1.5	2	84.5
70	95	<b>Rick Buoncore</b>	MAI Capital Management	Cleveland, Ohio	▪	▪	▪	▪	3865	10	25	84.4
71	90	<b>Randy Carver</b>	Raymond James	Mentor, Ohio	▪	▪	▪	▪	1030	1	1.6	84.3
72	N	<b>Randolph (Randy) Peterson</b>	First Republic Investment Management	San Francisco, Calif.	▪	▪	▪	▪	3262	1.3	15	84.3
73	74	<b>Kevin Myeroff</b>	NCA Financial Planners	Cleveland, Ohio	▪	▪	▪	▪	1311	1.5	3	84.3
74	84	<b>Malcolm Makin</b>	Raymond James	Westerly, R.I.	▪	▪	▪	▪	1069	1.5	3	84.3
75	N	<b>Shawn Parker</b>	Ameriprise Financial	Schaumburg, Ill.	▪	▪	▪	▪	1400	1.5	3.5	84.2
76	83	<b>Jeffrey Grinspoon</b>	HighTower	Vienna, Va.	▪	▪	▪	▪	1180	4	7	83.9
77	86	<b>Frank Marzano</b>	GM Advisory Group	Melville, N.Y.	▪	▪	▪	▪	1087	8	30	83.9
78	80	<b>Wally Obermeyer</b>	Obermeyer Wood Investment Counsel	Aspen, Colo.	▪	▪	▪	▪	1500	3	10	83.8
79	N	<b>Jeffrey Zlot</b>	The Presidio Group	San Francisco, Calif.	▪	▪	▪	▪	3930	28	50	83.8
80	N	<b>Debra Wetherby</b>	Wetherby Asset Management	San Francisco, Calif.	▪	▪	▪	▪	4132	10	15	83.8
81	85	<b>Matthew Young</b>	Richard C. Young & Co.	Newport, R.I.	▪	▪	▪	▪	969	1.8	5	83.7
82	79	<b>John Lesser</b>	Plante Moran Financial Advisors	Auburn Hills, Mich.	▪	▪	▪	▪	11888	26.5	91	83.6
83	N	<b>Frank Reilly</b>	Reilly Financial Advisors	La Mesa, Calif.	▪	▪	▪	▪	1193	1	4.5	83.5
84	100	<b>Andy Berg</b>	Homrich Berg	Atlanta, Ga.	▪	▪	▪	▪	4230	3	7	83.5
85	93	<b>George Papadoyannis</b>	Ameriprise Financial	San Mateo, Calif.	▪	▪	▪	▪	4400	2	7.5	83.5
86	96	<b>Scott George</b>	Mason Investment Advisory Services	Reston, Va.	▪	▪	▪	▪	5536	42	100	83.5
87	76	<b>Van Pearcy</b>	Raymond James	Midland, Texas	▪	▪	▪	▪	1420	3	10	83.5
88	N	<b>Paul C. Carbetta II</b>	Ameriprise Financial	Worthington, Ohio	▪	▪	▪	▪	1718	0.4	1.3	83.5
89	62	<b>James Meredith</b>	Hefren-Tillotson	Pittsburgh, Pa.	▪	▪	▪	▪	1457	1.2	3.9	83.4
90	91	<b>Shari Burns</b>	United Capital Seattle	Seattle, Wash.	▪	▪	▪	▪	1500	5.7	8	83.4
91	72	<b>Kevin VanDyke</b>	Bloomfield Hills Financial	Bloomfield Hills, Mich.	▪	▪	▪	▪	840	2	4	83.3
92	N	<b>Joseph Jacques</b>	Jacques Financial	Rockville, Md.	▪	▪	▪	▪	676	0.8	1.2	83.2
93	N	<b>Jerry Deren</b>	The Presidio Group	Dallas, Texas	▪	▪	▪	▪	3930	28	50	83.2
94	92	<b>Thomas Myers</b>	Brownson, Rehms & Foxworth	Menlo Park, Calif.	▪	▪	▪	▪	9990	25	40	83
95	N	<b>Glenn Degenaaars</b>	First Republic Investment Management	New York, N.Y.	▪	▪	▪	▪	7422	1.5	3	83

96	94	<b>Andrew Rand</b>	Rand & Associates	San Francisco, Calif.	▪	▪	▪	▪	979	3	5	82.9
97	97	<b>Patrick McClain</b>	Hanson McClain Advisors	Sacramento, Calif.	▪	▪			2023	0.5	1	82.7
98	98	<b>Scott T. Hanson</b>	Hanson McClain Advisors	Sacramento, Calif.	▪	▪			2023	0.5	1	82.7
99	N	<b>Erin Botsford</b>	Botsford Financial Group	Frisco, Texas	▪	▪	▪	▪	871	5	10	82.7
100	N	<b>Greg Sullivan</b>	Sullivan, Bruyette, Speros & Blayney	McLean, Va.		▪	▪	▪	2950	5	10	82.7

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