

THE TOP 100 INDEPENDENT ADVISORS IN AMERICA

Name	Firm (b/d)	City	Est. AUM in \$MM	Yrs. In Biz	Business Description/Specialty
76 Richard W. Basler	Raymond James Financial Services	St. Louis, Mo.	275	38	Comprehensive investment management.
77 Thomas B. Hamlin	Hamlin Financial and Insurance Services (Raymond James Financial Services)	Portland	275	18	Pre-retirees and retirees, inflation hedging.
78 G. Andrew Ahrens	Ahrens Investment Partners (LPL Financial)	Lafayette, La.	275	19	Financial asset allocation.
79 Patricia Brennan	Key Financial (Royal Alliance)	Westchester, Pa.	274	23	Comprehensive financial planning and coordination for individuals aged 50 and up.
80 Daniel H. Boyce	Center for Financial Planning (Raymond James Financial Services)	Southfield, Mich.	270	26	Wealth management for HNW individuals.
81 Robert F. Wamhoff	Wamhoff Financial Planning (VSR Financial Services)	Hazelwood, Mo.	265	18	Financial planning, tax planning and charitable planning.
82 Stephan Cassaday	Cassaday & Company (Royal Alliance)	McLean, Va.	263	31	Financial planning and investment management for HNW individuals and small businesses.
83 Timothy Werth	VSR Financial Services	Hays, Kan.	261	16	Financial planning.
84 George Paul Jackson	Jackson Retirement Planning (Raymond James Financial Services)	Heathrow, Fla.	260	15	Wealth management for HNW families.
85 David J. Workman	LPL Financial	Logansport, Ind.	260	21	Managing retirement plans.
86 Todd Arthur Sanford	Sanford Financial Services (Raymond James Financial Services)	Portage, Mich.	259	25	Multi-specialty firm for educators, small-business owners and employees of major corporations with a local presence.
87 Mark R. Brown	Brown & Tedstrom (LPL Financial)	Denver, Colo.	254	25	Comprehensive wealth management for successful entrepreneurs and business owners.
88 Robert D. Kantor	XML Financial Group (LPL Financial)	Rockville, Md.	252	45	Financial planning.
89 Brad Orvieto	Strategic Asset Management Group Advisors (Mutual Service Corp.)	Fort Lauderdale	250	28	Wealth management for HNW and non-profits.
90 Ray Lucia	Raymond J. Lucia Companies (First Allied)	San Diego	250	34	Financial planning and advice via radio.
91 Dale L. Cebert	Cebert Wealth Management Group (National Planning Corp.)	The Villages, Fla.	250	26	Retirement income planning specialists.
92 John P. Keeney	Keeney Financial Group (LPL Financial)	Columbia, Md.	250	20	Comprehensive financial planning.
93 J. Scott McKee	The Quality Group (LPL Financial)	Eugene, Ore.	250	11	Income investing for retirement, with a client asset minimum of \$1.5 million.
94 Paul A. Levis	Summit Financial Consultants (Cadaret, Grant)	Yonkers	248	31	Financial planning, estate planning, pensions and business services for closely held corporations, proprietorships and professionals.
95 Kathleen Anne Muldoon	Carter Financial Management (Raymond James Financial Services)	Dallas	246	28	Financial planning.
96 Wayne von Borstel	von Borstel & Associates (LPL Financial)	Dalles, Ore.	245	23	Wealth management.
97 Trudy Haussmann	Haussmann Financial (Securities America)	Newport Beach, Calif.	244	22	Boutique financial planning firm specializing in retirement for Fortune 500 employees.
98 Joseph Sgroi	Sgroi Financial (Cadaret, Grant)	West Seneca, N.Y.	243	37	Annuities, financial planning for school systems and non-profits.
99 Lesley Sommers	Sommers Financial Group (Walnut Street Securities, Inc.)	New City, N.Y.	242	26	HNW clients and affluent marketplace.
100 William "Bill" Frances Garbarino	Raymond James Financial Services	Danbury, Conn.	240	23	Retail clients, corporate executives, financial and estate planning.