
Forbes

AMERICA'S TOP FINANCIAL SECURITY PROFESSIONALS



BY JASON BISNOFF AND SHOOK RESEARCH

After years of ranking the nation's preeminent wealth managers, *Forbes* and SHOOK Research have expanded our coverage to include advisors from the insurance industry, a group we call Financial Security Professionals. This inaugural group of distinguished specialists manages client policies in excess of \$24 billion. Of the 250 people on this list, 34 are women and 58 are Millennials. As the economic recovery continues, the exceptional advisors featured here are helping their clients in a world in which wealth preservation and protection matter more than ever.

1. Keith Wagner
Northwestern Mutual
FRISCO, TX
\$6B

2. Corey Schneider
Sentinel Solutions
NEW YORK, NY
\$3.7B

3. Jeri Turley
Winged Keel Group
RICHMOND, VA
\$55B

4. Philip de Bruyn
Southern Wealth Management
DALLAS, TX
\$3.1B

5. David J. Carroll
Financial Architects Partners
PALO ALTO, CA
\$26.2B

6. Scott Sparks
Northwestern Mutual
DENVER, CO
\$3B

7. Shaun McDuffee
North Star/Securian
AUSTIN, TX
\$13.6B

8. Christopher Warren
Lawless, Edwards & Warren Wealth Management
BOCA RATON, FL
\$940M

9. Steve Braun
Northwestern Mutual
CHICAGO, IL
\$1B

10. Vincent D'Addona
Strategies for Wealth
LIDO BEACH, NY
\$1.9B

11. Ron Rubin
RFG Wealth Management
NEW YORK, NY
\$1.5B

12. Lizzie Dipp Metzger
New York Life
EL PASO, TX
\$687M

13. A.J. Fechter
Morgan Stanley Private Wealth Management
WASHINGTON, DC
\$513M

14. Benjamin Feldman
Northwestern Mutual
NEW YORK, NY
\$3.5B

15. Eric Wilson
Nucleus Advisors
NEW YORK, NY
\$1.7B

16. Bradley Baune
Northwestern Mutual
MENDOTA HEIGHTS, MN
\$2.4B

17. Vincent Toscano
Lincoln Financial
SYOSSET, NY
\$1.8B

18. Peter Tillinghast
Northwestern Mutual
BALTIMORE, MD
\$1B

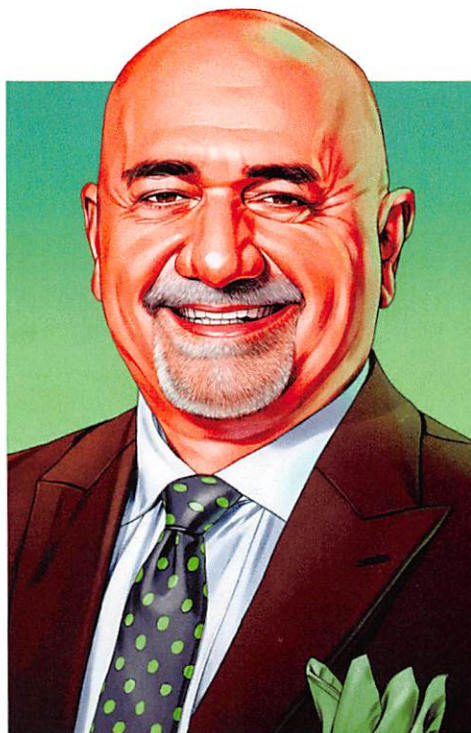
19. Mark Murphy
Northeast Private Client Group
ROSELAND, NJ
\$5.2B

20. Paul Ludacka
Northwestern Mutual
OMAHA, NE
\$2.4B

21. Mark Kull
Northwestern Mutual
LOUISVILLE, KY
\$1.2B

22. Kathy Nolan
Family Focus Financial Group
WALL, NJ
\$186M

23. Josh Jalinski
Jalinski Advisory Group
TOMS RIVER, NJ
\$400M



No. 10

VINCENT D'ADDONA

STRATEGIES FOR WEALTH

Lido Beach, New York • \$1.9B

"Life insurance done well is a fixed-income equivalent and behaves like a fixed-income asset with no volatility. For many clients, life insurance is part of their 'fixed-income' component. But the death benefit is important, because life insurance is the only product of its kind that does the job that it does."

24. Wendy Edwards
New York Life
LAKE SUCCESS, NY
\$339M

25. John Sterner
Northwestern Mutual
CHATTANOOGA, TN
\$1.5B

26. Mark Cortazzo
Wealth Enhancement Group
PARSIPPANY, NJ
\$600M

27. Randy Lehman
Northwestern Mutual
FORT WAYNE, IN
\$3.4B

28. Howard Goldman III
Northwestern Mutual
OWINGS MILLS, MD
\$1.5B

29. Rick Hu
Northwestern Mutual
NEW YORK, NY
\$1B

30. Victoria Henning-Smejda
Azura Wealth Advisers
NEW YORK, NY
\$827M

31. Matthew Greene
Northwestern Mutual
NORWALK, CT
\$1.9B

32. Amy Jamrog
The Jamrog Group
HOLYOKE, MA
\$80M

33. Alison Flaum
New York Life
SAN ANTONIO, TX
\$280M

34. Justin Charise
Northwestern Mutual
WESTPORT, CT
\$2B

35. Al Papa
NFP
ROYAL OAK, MI
\$5.2B

36. Mark Lupton
Northwestern Mutual
SPOKANE VALLEY, WA
\$1.9B

37. Tad Hill
Freedom Financial Group
BIRMINGHAM, AL
\$184M

38. Michael O'Donnel
Estate Partners
HOUSTON, TX
\$1B

39. Shawn W. Phelps
Northwestern Mutual
COLUMBUS, OH
\$559M

40. Gary Taylor
Northwestern Mutual
CHARLOTTEVILLE, VA
\$689M

41. Chris McMahon
MFA Wealth
PITTSBURGH, PA
\$15.7B

42. Darinka Lora-Stepan
New York Life
CHICAGO, IL
\$288M

43. Hunter Ewing
High Ground Company
ATLANTA, GA
\$2.1B

44. Matt Carothers
Northwestern Mutual
COLUMBUS, IN
\$810M

45. Mike Flynn Jr.
New York Life
CAPITOLA, CA
\$497M

46. William Newman
Northwestern Mutual
ALBANY, NY
\$715M

47. Brian Breitenwischer
Lincoln Financial
DENVER, CO
\$500M



No. 12

LIZZIE DIPP METZGER

NEW YORK LIFE
El Paso, Texas • \$687M

"Something you have to overcome a lot in this industry is the bad rap it gets with people thinking poorly of insurance salesmen, like in the movie *Groundhog Day*. In reality, we serve people and protect widows, children and families in what, at the end of the day, is the hardest time of their life."

48. **Ed McGill**
Northwestern Mutual
URBANDALE, IA
\$1.2B
49. **Michael Testa**
New York Life
SARATOGA SPRINGS, NY
\$415M
50. **Reva Azeez**
ROA Partners
HOUSTON, TX
\$990M
51. **Gordon Hartman II**
New York Life
DOWNERS GROVE, IL
\$236M
52. **Craig Volk**
Northwestern Mutual
EDINA, MN
\$2.1B
53. **Doug Lambert**
New York Life
BELLEVUE, WA
\$160M
54. **Meagan Phelps**
Empress Investment Group
SANTA MONICA, CA
\$110M
55. **Christie Mueller**
New York Life
BELLEVUE, WA
\$76M
56. **Stephanie Sherman**
Prudential Financial
ROCKAWAY, NJ
\$475M
57. **William Ryan**
William Ryan Company
LAGUNA NIGUEL, CA
\$325M
58. **Sangita Datta**
New York Life
FRISCO, TX
\$1.1B
59. **Tyler Layne**
Northwestern Mutual
TWIN FALLS, ID
\$510M
60. **Andrew Cleary**
SFP Wealth
WELLESLEY, MA
\$1.5B
61. **Elizabeth Ann Brooks**
Allstate Financial Services
LARGO, FL
\$318M
62. **Joel Field III**
Field Financial Strategies
NEW YORK, NY
\$200M
63. **Tina Dandry-Mayes**
New York Life
MARRERO, LA
\$192M
64. **Mike Sedjo**
Northwestern Mutual
EDINA, MN
\$834M
65. **Andrew Rasmussen**
Northwestern Mutual
ATHENS, GA
\$958M
66. **Sahand Elmtalab**
M&E Catalyst Group
MINNEAPOLIS, MN
\$3.4B
67. **Travis Gerhard**
New York Life
MERIDIAN, ID
\$270M
68. **Steve Dark**
One Wealth Partners Insurance & Financial Solutions
SANTA MONICA, CA
\$4.9B
69. **Eric Naison-Phillips**
Winged Keel Group
NEW YORK, NY
\$55B
70. **Douglas Benson**
Northwestern Mutual
ANKENY, IA
\$1.7B
71. **Robert Petrocelli**
New York Life
NEW YORK, NY
\$1.5B
72. **Greg Large**
Lenox Advisors
NEW YORK, NY
\$35B
73. **Chris Daniels**
Passerelle Partners
CHARLOTTE, NC
\$5.5B
74. **Scott Ashline**
Northwestern Mutual
LA JOLLA, CA
\$1.5B
75. **Ken Fink**
Tamar Fink
MINNETONKA, MN
\$3B
76. **William Beynon**
Capital Wealth Advisors
NAPLES, FL
\$1.7B
77. **David Simkowitz**
SimkowitzCo
BROOKLYN, NY
\$8.4B
78. **Mike Jones**
Northwestern Mutual
LAKEWOOD, CO
\$1.2B
79. **Matthew Lipscomb**
Ashford Advisors
ATLANTA, GA
\$1.5B
80. **Rick Paulsen**
New York Life
STOCKTON, CA
\$1.5B
81. **John Lentz**
Strategic Wealth Group
TALLAHASSEE, FL
\$1.5B
82. **Adam Riegel**
Northwestern Mutual
WELLESLEY, MA
\$1.6B
83. **Michael Zager**
Z Wealth Solutions
WESTON, FL
\$3.7B
84. **Adam Herzog**
New York Life
LAKE FOREST, CA
\$514M
85. **Todd McClure**
Northwestern Mutual
ZIONSVILLE, IN
\$1.2B
86. **John Dovich**
MAI Capital Management
CINCINNATI, OH
\$224M
87. **J. Dave Hunter**
Financial Designs Ltd.
DENVER, CO
\$5.5B

88. **Mark Wise**
Northwestern Mutual
INDIANAPOLIS, IN
\$1.9B
89. **Julia Hsiao**
New York Life
CUPERTINO, CA
\$1.5B
90. **Asghar Kazim**
United Wealth Group
MONMOUTH JUNCTION, NJ
\$1.2B
91. **Howard Sharfman**
NFP
CHICAGO, IL
\$21.6B
92. **Zach Burton**
Northwestern Mutual
FARMINGTON, UT
\$1.4B
93. **Adam Sendzischew**
Jones Lowry
MIAMI, FL
\$2.8B
94. **Tyler Horning**
TDC Life
MAUMEE, OH
\$8.5B
95. **Chelsea Maeda**
Winged Keel Group
PORTLAND, OR
\$55B

96. **Raul Tavdy**
Northwestern Mutual
NEW YORK, NY
\$2.8B
97. **George Groome**
Colton Groome & Company
ASHEVILLE, NC
\$3.4B
98. **Bill Moore**
W.C. Moore Financial Services
CENTREVILLE, VA
\$404M
99. **John Adams**
Northwestern Mutual
AKRON, OH
\$883M
100. **Rebecca Yuan**
Prudential Financial
RENO, NV
\$623M
101. **Michele Fine**
Cornerstone Wealth Advisory
JERICHO, NY
\$1.2B
102. **Michael Hanna**
Azura Wealth Advisers
NEW YORK, NY
\$803M
103. **Donald Lippencott**
New York Life
EAST SETAUKET, NY
\$800M

104. **Jarrod Hirschfeld**
Wilcox Financial
TOLEDO, OH
\$3.5B
105. **Robert Kaplan**
Kaplan Financial
ENCINO, CA
\$1.8B
106. **Jim Hebets**
NFP
PHOENIX, AZ
\$15B
107. **Stephen Schwartz**
Northwestern Mutual
NEW YORK, NY
\$7.2B
108. **Kelly Decker**
New York Life
PLYMOUTH, MN
\$250M
109. **Robert C. Kulle**
Heritage Capital Strategies
WESTLAKE VILLAGE, CA
\$1.5B
110. **Michael Berry**
Addicus
NEWTOWN, CT
\$500M
111. **Todd Tausin**
Northwestern Mutual
RIDGELAND, MS
\$1.7B

112. **Bill Leisman**
Leisman Insurance Agency
WALTHAM, MA
\$4.4B
113. **Barry Boscoe**
Brighton Advisory Group
ENCINO, CA
\$758M
114. **Daniel Chang**
New York Life
BREA, CA
\$442M
115. **Marc Silverman**
Silverman Financial
MIAMI, FL
\$150M
116. **Jan Zhuang**
Transamerica Financial Advisors
MAITLAND, FL
\$3.5B
117. **David Schimberg**
Northwestern Mutual
CINCINNATI, OH
\$4B
118. **Tammy Plotkin-Oren**
New York Life
BERKELEY, CA
\$2B
119. **Jeff Sheppard**
Family Wealth Group
LEXINGTON, KY
\$458M
120. **E. Peter Taboris**
Northwestern Mutual
NEW YORK, NY
\$3.5B
121. **Jennifer Dessert**
New York Life
WALTHAM, MA
\$1.7B
122. **Kenyon Lang**
Cambium Group
RYE BROOK, NY
\$2.2B
123. **Jason Prather**
NFP
LITTLE ROCK, AR
\$2.4B
124. **Kristen Gulbran**
New York Life
BELLEVUE, WA
\$213M
125. **Justin Gerow**
Primerica/
PFS Investments
PUNTA GORDA, FL
\$350M
126. **Michael Schwartz**
Magnus Financial
NEW YORK, NY
\$1.6B
127. **John Riebling**
New York Life
LONG VALLEY, NJ
\$851M
128. **Adam Waitzman**
Northwestern Mutual
CHICAGO, IL
\$4.3B
129. **Nicholas Rogers**
New York Life
YAKIMA, WA
\$414M
130. **Mark Cecil**
United Wealth Advisors Group
ROCKVILLE, MD
\$418M

131. **Rod Sager**
IPS Advisors
DALLAS, TX
\$5.1B
132. **Scott DeSantis**
Northwestern Mutual
BOSTON, MA
\$5B
133. **Barrett Ethington**
New York Life
SOUTH JORDAN, UT
\$250M
134. **Theodore Sangalis**
Northwestern Mutual
OAK BROOK, IL
\$796M
135. **Jayshree Patel**
New York Life
LINCOLNWOOD, IL
\$4B
136. **Thomas Fanning Sr.**
Heritage Strategies
WOODBURY, NY
\$4.2B
137. **Doug Liptak**
SignatureFD
ATLANTA, GA
\$2.5B
138. **Xin Wang**
New York Life
HOUSTON, TX
\$514M
139. **David Byers**
Capital Strategies Group
BIRMINGHAM, AL
\$5.8B
140. **Jason Blomgren**
Lincoln Financial
CLIVE, IA
\$400M
141. **Chad Courtois**
New York Life
NEW IBERIA, LA
\$500M
142. **Ryan Saunders**
Northwestern Mutual
CHARLOTTE, NC
\$832M
143. **Anita Grossman**
Lincoln Financial
CHERRY HILL, NJ
\$1B
144. **Bob Roth**
Northwestern Mutual
WEST HARTFORD, CT
\$1.9B
145. **John Becker**
Prudential Financial
MELBOURNE, FL
\$2B
146. **Kirk Quaschnick**
New York Life
FRISCO, TX
\$300M
147. **Jerry David**
Northwestern Mutual
MILWAUKEE, WI
\$1.4B
148. **Brady Knight**
Winged Keel Group
HOUSTON, TX
\$2.1B
149. **Sam Jacobs**
Manor House Capital Insurance Services
CHERRY HILL, NJ
\$400M
150. **Kyle Mostransky**
New York Life
HUNTINGTON, NY
\$511M

151. Craig Molldrem
North Star
Resource Group
DALLAS, TX
\$2.1B

152. Leonard Raskin
Raskin Global
HUNT VALLEY, MD
\$558M

153. Rebecca Bast
Northwestern Mutual
LUTZ, FL
\$801M

154. Dharmesh Goel
New York Life
DOWNERS GROVE, IL
\$4B

155. Robert Bagonis
Tritium Private
Wealth Strategies
KING OF PRUSSIA, PA
\$5B

156. James Adkins
New York Life
BETHESDA, MD
\$1B

157. Adam Sherman
1847Financial
CONSHOHOCKEN, PA
\$3.2B

158. Kuldeep Madan
Madan+Associates
MELVILLE, NY
\$600M

159. Kenneth Knox
Tenzing Insurance
Strategies
NEEDHAM, MA
\$1.2B

160. Christopher Battersby
New York Life
BOSTON, MA
\$879M

161. Thomas R. Wilmerk
Northwestern Mutual
BARBOURSVILLE, WV
\$2B

162. Mark P. Braaten
MarkBRAATEN
WAUKESHA, WI
\$5.1B

163. Todd Purich
New York Life
RALEIGH, NC
\$826M

164. Howard Lashner
Primerica
HUNTINGDON
VALLEY, PA
\$1.8B

165. Ajay Parikh
New York Life
ARTESIA, CA
\$1.7B

166. Royce Zimmerman
Northwestern Mutual
DENVER, CO
\$1.5B

167. Glen Golish
G Wealth Strategies
BOCA RATON, FL
\$2B

168. Anthony Pesce
Prudential Financial
WHITE PLAINS, NY
\$900M

169. Steve Rowley III
New York Life
PLYMOUTH, MI
\$275M

170. Sam Laorenza
Northwestern Mutual
WOBURN, MA
\$1.6B

171. Jason Giorgio
Pacific Advisors
CLAREMONT, CA
\$1.4B

172. Barry Finkelstein
New York Life
DEERFIELD, IL
\$160M

173. William D. Yancey
Northwestern Mutual
LOUISVILLE, KY
\$1.7B

174. David McGuire
New York Life
BRIDGEWATER, MA
\$480M

175. Thomas Zuger
McDermid
Financial Group
BUFFALO, NY
\$5.1B

176. K.C. Mink
The Partners Group
PORTLAND, OR
\$1.2B

177. Marc Mandell
New York Life
HOUSTON, TX
\$800M

178. Delynn Alexander
Northwestern Mutual
DURHAM, NC
\$767M

179. Craig Kirsner
Stuart Estate Planning
COCONUT CREEK, FL
\$100M

180. Christopher McClure
Lincoln Financial
SAN RAMON, CA
\$291M

181. Laura Jensen Siddique
New York Life
SACRAMENTO, CA
\$150M

182. Kevin Spahn
Northwestern Mutual
LOMBARD, IL
\$1.5B

183. Anthony Miller
New York Life
BILLINGS, MN
\$650M

184. Steven Taub
New York Life
DEERFIELD, IL
\$650M

185. Jonathan T. Viscount
Prudential Financial
DRESHER, PA
\$1B

186. Tom McCarty
New York Life
WALTERBORO, SC
\$320M

187. David Miller
Northwestern Mutual
LA JOLLA, CA
\$1.2B

188. Matt Henderson
Henderson
Financial Group
TULSA, OK
\$1.9B



No. 100

REBECCA YUAN
PRUDENTIAL FINANCIAL
Reno, Nevada • \$623M

"President Biden's tax proposals are causing a lot of conversations because they're on the way—and there are also lots of clients looking to retire at the same time. Tax planning and retirement planning come up on every single phone call."

189. Tracy Chen
New York Life
FLUSHING, NY
\$309M

190. Jim Fitzgerald
Northwestern Mutual
RICHMOND, VA
\$1.2B

191. Wendy Feldman
New York Life
CHANDLER, AR
\$424M

192. Keith Spengel
Northwestern Mutual
SKOKIE, IL
\$1.8B

193. Guy Baker
BTA Advisory Group
IRVINE, CA
\$1.5B

194. Loren Hsiao
Northwestern Mutual
ALLEN, TX
\$2.9B

195. Damon Lichtenberger
North Star
Resource Group
WAKE FOREST, NC
\$1.2B

196. Michael Ryan
Northwestern Mutual
BRAINTREE, MA
\$1.2B

197. John Iezzi
Northwestern Mutual
RICHMOND, VA
\$1.5B

198. Tyson Vines
New York Life
AURORA, OH
\$380M

199. Joshua Bradley
Capital City
Financial Partners
COLUMBIA, SC
\$75M

200. Benjamin Bruins
Lincoln Financial
CLIVE, IA
\$100M

201. Jeffrey Kirshner
Kirshner & Klarfeld
Financial Group
SCOTSDALE, AZ
\$513M

202. Art Blick
Northwestern Mutual
WEST PALM BEACH, FL
\$2.3B

203. J.R. Burke
Perspective
Financial Group
BERWYN, PA
\$1.5B

204. John Dwyer
Solid Rock
Financial Group
BISMARCK, ND
\$1B

205. Milt Belfer
The MB Group
WESTLAKE VILLAGE, CA
\$60M

206. Brian Stanley
Northwestern Mutual
MISHAWAKA, IN
\$1.3B

207. Christopher Corkern
Prudential Financial
BLUFFTON, SC
\$750M

208. Jonathan Krueger
LionsGate Advisors
CHESTERFIELD, MO
\$239M

209. Steve Maus
New York Life
DALLAS, TX
\$916M

210. Grant Monson
Alterra Advisors
BELLEVUE, WA
\$660M

211. Harry J. Mentonis
Northwestern Mutual
WILMINGTON, DE
\$2.9B

212. Joel Barjenbruch
JS Financial
LINCOLN, NE
\$125M

213. Roger McDowell
New York Life
KENNEWICK, WA
\$260M

214. Craig Myers
CR Myers & Associates
SOUTHFIELD, MI
\$1B

215. Bryan Krupin
Krupin Partners
BEVERLY HILLS, CA
\$6B

216. Gregory Shelton
New York Life
COVINGTON, LA
\$321M

217. Daniel Gould
Northwestern Mutual
DEERFIELD, IL
\$2.2B

218. Michael Levine
NFP
BRENTWOOD, TN
\$600M

219. Mike McGinley
Northwestern Mutual
INDIANAPOLIS, IN
\$950M

220. Hershey Mittelman
New York Life
BROOKLYN, NY
\$1.3B

221. Jay Cavanagh
NFP
MINNEAPOLIS, MN
\$5B

222. Michael Smith
Northwestern Mutual
EDINA, MN
\$1.2B

223. Juan Campos
Bullick Insurance
Agency
MIAMI, FL
\$140M

224. John Kilch
Northwestern Mutual
SCHAUMBURG, IL
\$1.1B

225. David Wischmeier
MBW Group
MINNEAPOLIS, MN
\$1.5B

226. Dan Bruno
New York Life
SARATOGA SPRINGS, NY
\$193M

227. Michael D'Aquila
Northwestern Mutual
CHICAGO, IL
\$4.4B

228. Melvin Pope III
Financial Partners
of North Florida
TALLAHASSEE, FL
\$250M

229. Bradley Burton
New York Life
VIENNA, VA
\$2B

230. Brian Walsh
Walsh & Nicholson
Financial Group
WAYNE, PA
\$748M

231. Jon Cunningham
Cunningham
Financial Group
BIRMINGHAM, AL
\$202M

232. James DiNardo
Northwestern Mutual
NEW YORK, NY
\$3.2B

233. Rhonda Weinberg
Whole Life Capital
COLTS NECK, NJ
\$130M

234. John Coates Jr.
New York Life
NABB, IN
\$172M

235. Mary Deutsch
MTD Financial
CHICAGO, IL
\$10.9M

236. Todd Grandy
Northwestern Mutual
HUNT VALLEY, MD
\$1.8B

237. Steven Schwartz
TDC Investment
Advisory
HOUSTON, TX
\$783M

238. Brett Burzynski
The Burzynski Group
TROY, MI
\$200M

239. Todd Marschall
Northwestern Mutual
NEW YORK, NY
\$730M

240. Michael Bartenhagen
Northwestern Mutual
DOWNERS GROVE, IL
\$1B

241. Frederick Boucher
Ameriprise
Financial Services
NASHUA, NH
\$171.8M

242. Thomas Fay
Stone Point
Financial Group
GLENVIEW, IL
\$691M

243. James Munder
Northwestern Mutual
INDIANAPOLIS, IN
\$720M

244. Anjali Singh
Pacific Advisors
PETALUMA, CA
\$303M

245. Loren Merkle
Merkle Retirement
Planning
GRIMES, IA
\$145M

246. Lou Cannataro
Northwestern Mutual
NEW YORK, NY
\$4.1B

247. Brian Mirau
Mirau Capital
Management
RUIDOSO, NM
\$155M

248. Carmen Lex
AIG Retirement
Services
MOUNT LAUREL, NJ
\$84M

249. Anthony Montenegro
Freedom Dream Team
HENDERSON, NV
\$365M

250. Warren Poirier
New York Life
PRINCE GEORGE, VA
\$141M