

WORKING
MOTHER
and SHOOK Research's

TOP WEALTH ADVISOR MOMS 2020

Our fourth-annual list has expanded to feature 500 of the most successful mothers working in financial advising today. Meet the list makers who are committed to helping families economically recover from COVID-19, plus get ideas from some of these moms for securing your own financial future, in the wake of the pandemic. [By Quinn Fish](#)

TOP WEALTH ADVISOR MOMS 2020

RANK	NAME	FIRM	LOCATION	TEAM CUSTODIED ASSETS	TYPICAL SIZE OF HOUSEHOLDS	TYPICAL NET WORTH OF RELATIONSHIPS	MINIMUM ACCOUNT SIZE OF NEW BUSINESS
1	Cheryl Young	Morgan Stanley Wealth Management	Los Gatos, CA	\$992M	\$3M-10M	\$10M-55M	\$3M
2	Colleen O'Callaghan	JP Morgan Securities	New York, NY	\$1.9B	\$25M-100M	\$25M-100M	\$25M
3	Laila Pence	Pence Wealth Management	Newport Beach, CA	\$1.3B	\$1M-15M	\$1M-30M	\$500K
4	Elaine Meyers	JP Morgan Securities	San Francisco, CA	\$2.9B	\$10M-1B	\$30M-1.5B	\$10M
5	Christina Boyd	Merrill Lynch Wealth Management	Wayzata, MN	\$924M	\$3M-30M	\$5M-50M	\$3M
6	Emily Rubin	UBS Financial Services	New York, NY	\$1.3B	\$5M-20M	\$5M-30M	\$5M
7	Marcie Behman	Merrill Private Wealth Management	Boston, MA	\$1.3B	\$15M-95M	\$15M-70M	\$4M
8	Gillian Yu	Morgan Stanley Private Wealth Management	San Francisco, CA	\$6.7B	\$20M-50M	\$50M-100M	\$10M
9	Donna Joyner	Merrill Lynch Wealth Management	Alpharetta, GA	\$849M	\$8M-14M	\$7M-15M	\$1M
10	Inna Kelly	Morgan Stanley Wealth Management	San Francisco, CA	\$1B	\$5M-30M	\$10M-70M	\$10M
11	Linnell Sullivan	Merrill Lynch Wealth Management	Cincinnati, OH	\$1.4B	\$4M-15M	\$5M-20M	\$2.5M
12	Ali Phillips	Obermeyer Wood Investment Counsel	Aspen, CO	\$1.4B	\$2M-15M	\$5M-20M	\$1M
13	Corina Davis	Merrill Lynch Wealth Management	Seattle, WA	\$625M	\$1M-4M	\$2M-5M	\$1M
14	Shannon Eusey	Beacon Pointe Advisors	Newport Beach, CA	\$6.9B	\$1M-5M	\$1M-60M	\$1M
15	Jessica Guo	UBS Financial Services	Wellesley, MA	\$423M	\$1M-20M	\$2M-50M	\$1M
16	Anna Winderbaum	Morgan Stanley Private Wealth Management	New York, NY	\$1.7B	\$25M-30M	\$40M-50M	\$5M
17	Gwen Campbell	Merrill Private Wealth Management	San Francisco, CA	\$1B	\$1M-325M	\$1M-25M	\$10M
18	Xi Qiao	UBS Financial Services	San Francisco, CA	\$798M	\$2M-250M	\$2M-1B	\$2M
19	Anouchka Balog	Morgan Stanley Wealth Management	Laguna Niguel, CA	\$609M	\$1M-20M	\$3M-25M	\$1M
20	Wendy Holmes	UBS Private Wealth Management	New York, NY	\$1.2B	\$4M-50M	\$15M-250M	\$10M
21	Nazie Saffari Moini	Merrill Lynch Wealth Management	Beverly Hills, CA	\$599M	\$500K-5M	\$2M-8M	\$500K
22	Aimee Cogan	Morgan Stanley Wealth Management	Sarasota, FL	\$934M	\$10M-25M	\$10M-50M	\$1M
23	Jennifer Ellison	B O S	Redwood City, CA	\$4.1B	\$3M-30M	\$5M-85M	\$3M
24	Diane Padalino	Merrill Private Wealth Management	Denver, CO	\$543M	\$30M-100M	\$10M-50M	\$10M
25	Diane Compardo	Moneta	St. Louis, MO	\$1.4B	\$5M-25M	\$10M-50M	\$5M
26	Alyssa Moeder	Merrill Private Wealth Management	New York, NY	\$4.2B	\$10M-250M	\$1M-25M	\$10M
27	Kathleen Youngerman	Morgan Stanley Private Wealth Management	Chesterfield, MO	\$376M	\$10M-50M	\$10M-100M	\$10M
28	Rachel Gottlieb	UBS Financial Services	New York, NY	\$850M	\$5M-100M	\$10M-500M	\$5M
29	Michelle Mayer	Merrill Private Wealth Management	Naples, FL	\$903M	\$10M-50M	\$8M-50M	\$5M
30	Danielle Prunier	Merrill Lynch Wealth Management	Century City, CA	\$960M	\$5M-20M	\$15M-20M	\$0
31	Emily Bach	Morgan Stanley Wealth Management	Orinda, CA	\$989M	\$3M-7M	\$4M-10M	\$1M
32	Ronya Corey	Merrill Lynch Wealth Management	Washington, DC	\$685M	\$5M-20M	\$2M-20M	\$2M
33	Beth Scanlan	Morgan Stanley Wealth Management	San Francisco, CA	\$432M	\$3M-15M	\$5M-25M	\$2M
34	Diane Hart	UBS Financial Services	Pasadena, CA	\$502M	\$3M-8M	\$6M-40M	\$2M
35	Rebecca Lerner	Merrill Lynch Wealth Management	New York, NY	\$701M	\$2M-10M	\$4M-15M	\$1M
36	Lisa A. Petrie	Wells Fargo Advisors	Incline Village, NV	\$252M	\$2M-12M	\$3M-15M	\$500K
37	Sherry Verburgt	UBS Financial Services	Houston, TX	\$733M	\$500K-2.5M	\$1.2M-3M	\$1M
38	Thais Piotrowski	Ameriprise Financial Services	Boca Raton, FL	\$463M	\$750K-6M	\$1.2M-5M	\$500K
39	Maria Colucci	Merrill Lynch Wealth Management	New York, NY	\$712M	\$3M-10M	\$10M	\$1M
40	Eileen O'Connor	Hemington Wealth Management	Falls Church, VA	\$802M	\$3M-40M	\$5M-50M	\$10M
41	Jill Bobigan	UBS Financial Services	New York, NY	\$677M	\$2M-4M	\$3M-10M	\$1M
42	Jenny Tsai	Morgan Stanley Private Wealth Management	Pasadena, CA	\$443M	\$5M-100M	\$10M-1B	\$2M
43	Katie Larsen	Merrill Lynch Wealth Management	Sewickley, PA	\$508M	\$1.5M-5M	\$3.5M-8M	\$1M
44	Janet Franco Gordon	Morgan Stanley Wealth Management	Coral Gables, FL	\$748M	\$2M-7M	\$5M-15M	\$2M
45	Anukka Mikkola	Merrill Lynch Wealth Management	Bellevue, WA	\$667M	\$1M-3.5M	\$1.5M-10M	\$750K
46	Kristina Van Liew	Morgan Stanley Graystone	Chicago, IL	\$5.2B	\$10M-150M	\$10M-100M	\$10M
47	Nina Abelman	Merrill Lynch Wealth Management	Bellevue, WA	\$459M	\$3M-25M	\$5M-25M	\$3M
48	Liz Weikes	JP Morgan Securities	New York, NY	\$3.5B	\$2M-10M	\$10M-75M	\$2M
49	Ylisa Sanford	Ameriprise Financial Services	Santa Rosa, CA	\$300M	\$475K-1M	\$3M	\$500K
50	Laura Wellon	UBS Financial Services	Atlanta, GA	\$1.7B	\$7M-50M	\$4M-25M	\$2M
51	Jennifer Garcia	Wells Fargo Advisors	Encino, CA	\$1B	\$5M-20M	\$10M-20M	\$5M
52	Rhonda Finby	Wells Fargo Advisors	Long Beach, CA	\$330M	\$2M-5M	\$5M-10M	\$1M
53	Michele B. O'Connor	Morgan Stanley Wealth Management	Boston, MA	\$263M	\$900K-18M	\$2M-4M	\$750K
54	Natalea Simmons	Merrill Lynch Wealth Management	St. Louis, MO	\$357M	\$1M-15M	\$3M-50M	\$1M
55	Sharon Klein	Wilmington Trust	New York, NY	\$1B	\$10M-100M	\$10M-500M	\$3M

• Client types represent 5 percent or more of each advisor's business. • Advisors are judged on individual contribution, but total team assets are shown, which can include one or more additional advisors. • Minimum account sizes are general because it can vary depending on a range of circumstances.

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56	Christina Collins	Northwestern Mutual	Chicago, IL	\$753M	\$1M-30M	\$1.5M-50M	\$500K
57	Sharon Cunningham	Morgan Stanley Wealth Management	New York, NY	\$400M	\$1M-3.5M	\$3.5M-15M	\$1M
58	Dianna L. Smith	Morgan Stanley Wealth Management	Leawood, KS	\$1B	\$3.5M-20M	\$5M-50M	\$0
59	Mitzi Michaelson	Merrill Lynch Wealth Management	Brentwood, TN	\$348M	\$1M-6M	\$3M-10M	\$250K
60	Kimberley Hatchett	Morgan Stanley Private Wealth Management	New York, NY	\$1.6B	\$10M-50M	\$25M-50M	\$5M
61	Jackie Moss	William Blair	Chicago, IL	\$734M	\$5M-80M	\$5M-150M	\$5M
62	Sarah Cammiso	Merrill Lynch Wealth Management	Vienna, VA	\$381M	\$1M-3M	\$2.5M-5M	\$500K
63	Cherie Bond	Morgan Stanley Wealth Management	Glenview, IL	\$509M	\$2M-4M	\$3.5M-20M	\$1M
64	Eden Lopez-Robles	JP Morgan Securities	New York, NY	\$3.4B	\$2M-10M	\$10M-75M	\$2M
65	Stacy Francis	Francis Financial	New York, NY	\$291M	\$700K-8M	\$3M-5M	\$1M
66	Mara Bralove	Morgan Stanley Wealth Management	Bethesda, MD	\$471M	\$1.5M-10M	\$2.5M-13M	\$1M
67	Kimberly Hunter	Wells Fargo Advisors	Santa Rosa, CA	\$750M	\$3M-20M	\$5M-30M	\$1M
68	Shelley Richardson	UBS Financial Services	Los Gatos, CA	\$758M	\$2M-20M	\$5M-50M	\$1M
69	Courtney Moore	Merrill Private Wealth Management	New York, NY	\$1.4B	\$5M-1B	\$5M-1B	\$10M
70	Sarah Mercurio	William Blair	Chicago, IL	\$446M	\$2M-20M	\$1M-30M	\$2M
71	Alli McCartney	UBS Private Wealth Management	New York, NY	\$1.3B	\$5M-30M	\$15M-100M	\$5M
72	Sara Wohl	Merrill Lynch Wealth Management	Ann Arbor, MI	\$374M	\$1M-8M	\$1M-10M	\$500K
73	Emily Hill	Morgan Stanley Wealth Management	Lawrence, KS	\$453M	\$2.6M-15M	\$2M-20M	\$2M
74	Anh Tran	JanHobbs Financial Group/LPL	Orange, CA	\$230M	\$1M-10M	\$3M-15M	\$1M
75	Valerie Dugan	Morgan Stanley Wealth Management	Hartford, CT	\$318M	\$1M-43M	\$2.5M-50M	\$1M
76	Julie Shechtman	Morgan Stanley Wealth Management	Glenview, IL	\$254M	\$1M-30M	\$2M-100M	\$500K
77	Delynn Alexander	Northwestern Mutual	Durham, NC	\$250M	\$250K-1.5M	\$2M-10M	\$250K
78	Jennifer Hartmann	Morgan Stanley Wealth Management	New York, NY	\$2.6B	\$1M-5M	\$1.5M-7M	\$500K
79	Kalyn Maher Walker	UBS Financial Services	San Diego, CA	\$748M	\$1M-5.5M	\$2M-10M	\$1M
80	Kim Luu-Tu	Ameriprise Financial Services	Vienna, VA	\$348M	\$250K-8M	\$500K-10M	\$500K
81	Rachel Barzilay	Merrill Lynch Wealth Management	Boca Raton, FL	\$891M	\$2M-15M	\$6M-20M	\$3M
82	Catherine Fang	Morgan Stanley Wealth Management	Menlo Park, CA	\$365M	\$2M-20M	\$5M-50M	\$5M
83	Michelle Young	Ameriprise Financial Services	Edina, MN	\$371M	\$750K-5M	\$1M-26M	\$500K
84	Susan Harrington	Morgan Stanley Wealth Management	Rockville, MD	\$438M	\$1M-3M	\$4M-8M	\$1M
85	Lee Ann Coburn	Merrill Lynch Wealth Management	Walnut Creek, CA	\$831M	\$1M-1.2M	\$2M-16M	\$500K
86	Nancy Popovich	Baird	McLean, VA	\$250M	\$1M-15M	\$2M-25M	\$500K
87	Joanne Zhong	UBS Financial Services	San Francisco, CA	\$1.2B	\$5M-100M	\$10M-200M	\$5M
88	Malia Morales	Merrill Private Wealth Management	Houston, TX	\$2.2B	\$25M-50M	\$25M-50M	\$10M
89	Angela Mwanza	UBS Private Wealth Management	New York, NY	\$807M	\$10M-100M	\$25M-500M	\$25M
90	Julia Carlson	Financial Freedom Wealth Management Group/LPL	Newport, OR	\$248M	\$350K-1M	\$750K-1.5M	\$0
91	Annie Etchegoyhen	Merrill Lynch Wealth Management	Menlo Park, CA	\$729M	\$5M-15M	\$5M-20M	\$2.5M
92	Stacey Barrins	Morgan Stanley Wealth Management	Chicago, IL	\$631M	\$2M-10M	\$2M-15M	\$1M
93	Brenna Saunders	Creative Planning	Overland Park, KS	\$1.9B	\$400K-3.3M	\$1M-22.3M	\$400K
94	Elizabeth Miller	Merrill Lynch Wealth Management	Peoria, IL	\$1.1B	\$100K-29M	\$250K-30M	\$250K
95	Renee Fourcade	UBS Financial Services	Los Angeles, CA	\$2.7B	\$8M-12M	\$8M-12M	\$100K
96	Heather Locus	BDF	Itasca, IL	\$3.8B	\$1M-10M	\$2M-15M	\$1M
97	Stefani Bollag	Merrill Lynch Wealth Management	New York, NY	\$1.2B	\$750K-50M	\$2M-15M	\$1M
98	Joan Valenti	LPL Financial	Farmington, CT	\$440M	\$1M-10M	\$2M-15M	\$500K
99	Ann Wang	Merrill Lynch Wealth Management	San Francisco, CA	\$279M	\$1.5M-5M	\$3.5M-6M	\$1M
100	Susan Feitelberg	Morgan Stanley Wealth Management	New York, NY	\$192M	\$1M-5M	\$3M-15M	\$1M
101	Laura Steckler	Steckler Wealth Management Group of Raymond James	Coral Gables, FL	\$247M	\$1M-6M	\$2M-12M	\$1M
102	Beth Norman	RBC Wealth Management	Madison, WI	\$450M	\$750K-3M	\$1.5M-5M	\$250K
103	Bonnie Richards	UBS Private Wealth Management	New York, NY	\$807M	\$20M-100M	\$10M-100M	\$10M
104	Kate Waters	Morgan Stanley Wealth Management	New York, NY	\$1B	\$4M-20M	\$7M-50M	\$2M
105	Andrea Berardino Bevis	UBS Private Wealth Management	Boston, MA	\$705M	\$5M-50M	\$10M-100M	\$5M
106	Kimberly Maez	Ameriprise Financial Services	Englewood, CO	\$495M	\$500K-7M	\$1.5M-20M	\$0
107	Nicole Primack Andres	Merrill Private Wealth Management	New York, NY	\$832M	\$10M-20M	\$10M-15M	\$2.5M
108	Ruth Berger	RJ Wealth Management at Hightower	New York, NY	\$480M	\$2M-15M	\$3M-20M	\$1M
109	Haley Kaufman	Merrill Lynch Wealth Management	Washington, DC	\$761M	\$2M-5M	\$3M-8M	\$1M
110	Daphne Chi	UBS Financial Services	San Francisco, CA	\$208M	\$1M-10M	\$5M-25M	\$2M
111	Carlette McMullan	William Blair	Chicago, IL	\$703M	\$1M-5M	\$4M-10M	\$500K
112	Christina Yuni	Merrill Lynch Wealth Management	Palo Alto, CA	\$1.2B	\$2M-10M	\$3M-15M	\$1M

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RANK	NAME	FIRM	LOCATION	TEAM CUSTODIED ASSETS	TYPICAL SIZE OF HOUSEHOLDS	TYPICAL NET WORTH OF RELATIONSHIPS	MINIMUM ACCOUNT SIZE OF NEW BUSINESS
113	Hanane Lemlih	Wells Fargo Advisors	McLean, VA	\$1.3B	\$2.5M-20M	\$8M-75M	\$2M
114	Ann Lutz	UBS Financial Services	Cleveland, OH	\$735M	\$2M-10M	\$5M-50M	\$1M
115	Stephanie Ackler	Ackler Wealth Management of Wells Fargo Advisors	New York, NY	\$251M	\$500K-10M	\$1M-25M	\$1M
116	Holly Baroway	Stifel	Denver, CO	\$338M	\$500K-2.5M	\$750K-5M	\$500K
117	Elyssa Coleman-Polster	Merrill Lynch Wealth Management	New York, NY	\$882M	\$750K-10M	\$1M-20M	\$0
118	Elizabeth Engelmann	UBS Financial Services	Bloomington, MN	\$450M	\$1M-8M	\$2M-12M	\$1M
119	Kara Boccella	Camden Capital	Century City, CA	\$3.9B	\$2M-35M	\$5M-60M	\$1M
120	Ariel Jacobs	Merrill Lynch Wealth Management	Fort Lee, NJ	\$963M	\$800K-4M	\$1M-20M	\$250K
121	Vanessa Martinez	The Lerner Group at Hightower	Deerfield, IL	\$1B	\$2M-15M	\$5M-20M	\$2M
122	Nadia Allaudin	Merrill Lynch Wealth Management	Century City, CA	\$422M	\$1.5M-5M	\$1M-400M	\$0
123	Rachel Cohen	Morgan Stanley Wealth Management	West Conshohocken, PA	\$297M	\$1M-15M	\$2M-20M	\$1M
124	Gabrielle Clemens	RBC Wealth Management	Boston, MA	\$319M	\$1M-5M	\$3M-9M	\$1M
125	Ileana Dominguez	UBS Financial Services	Henderson, NV	\$369M	\$1M-35M	\$1M-70M	\$1M
126	Christina Paul	Morgan Stanley Wealth Management	New York, NY	\$426M	\$1M-20M	\$2M-30M	\$1M
127	Gretchen Hollstein	Litman Gregory Asset Management	Larkspur, CA	\$1.7B	\$3M-25M	\$5M-35M	\$3M
128	Mary Sexton	Morgan Stanley Wealth Management	Washington, DC	\$523M	\$1M-10M	\$2.5M-30M	\$500K
129	Brenda Vanderslice	UBS Financial Services	Memphis, TN	\$276M	\$1.1M-5M	\$2M-9M	\$500K
130	Katie Thompson	Merrill Lynch Wealth Management	Albuquerque, NM	\$794M	\$1.5M-5M	\$2.5M-10M	\$400K
131	Michelle Fullerton	Morgan Stanley Wealth Management	Los Angeles, CA	\$632M	\$1M-15M	\$3M-20M	\$1M
132	Debra Tagg	Brennan Financial Services	Addison, TX	\$240M	\$2M-10M	\$2M-20M	\$1M
133	Debra Patriquin	Merrill Lynch Wealth Management	Newport Beach, CA	\$243M	\$1M-5M	\$3M-8M	\$1M
134	Traci Richmond	Raymond James Financial Services	Bethesda, MD	\$341M	\$100K-10M	\$250K-15M	\$100K
135	Kelly Bolton	Merrill Lynch Wealth Management	Germantown, TN	\$442M	\$1.5M-17M	\$2.5M-38M	\$1M
136	Karen Robbins	UBS Financial Services	Newtown, PA	\$649M	\$1M-10M	\$1M-9M	\$500K
137	Wendy Lamberg Greeley	Merrill Lynch Wealth Management	Toledo, OH	\$279M	\$1.5M-12.5M	\$2M-20M	\$500K
138	Megan Brozowski	Mariner Wealth Advisors	Madison, NJ	\$214M	\$2M-3M	\$2M-5M	\$0
139	Emmeline Swanson	Merrill Lynch Wealth Management	New York, NY	\$25.1B	\$5M-100M	\$250-750M	\$5M
140	Laura Weiss	UBS Financial Services	Florham Park, NJ	\$367M	\$750K-5M	\$1.5M-10M	\$250K
141	Pamela Rigsby	Pursuit Wealth Strategies/Raymond James	Raleigh, NC	\$220M	\$750K-5M	\$750K-7M	\$750K
142	Tiffany Mock Briggs	Merrill Lynch Wealth Management	San Antonio, TX	\$391M	\$500K-35M	\$1M-35M	\$500K
143	Catherine Chen	RBC Wealth Management	San Francisco, CA	\$2.2B	\$2M-20M	\$2M-50M	\$5M
144	Kimberly St. Pierre	Ameriprise Financial Services	Plymouth Meeting, PA	\$418M	\$750K-10M	\$1.5M-15M	\$500K
145	Molly Chelovich	Merrill Lynch Wealth Management	Grand Rapids, MI	\$245M	\$800K-3M	\$2M-5M	\$300K
146	Pamela Thompson	Mariner Wealth Advisors	Louisville, KY	\$202M	\$2.1M-7.8M	\$2M-8M	\$0
147	Kay Grasman	Morgan Stanley Wealth Management	New York, NY	\$893M	\$10M-20M	\$10M-50M	\$2M
148	Janette Acton	Merrill Lynch Wealth Management	Oak Brook, IL	\$356M	\$1M-10M	\$1M-10M	\$750K
149	Jodi Vleck	Beta Wealth Group	San Diego, CA	\$300M	\$2M-8M	\$3M-10M	\$0
150	Katie Pan	Merrill Lynch Wealth Management	Pasadena, CA	\$358M	\$2M-10M	\$5M-20M	\$1M
151	Lisa Zaidle Clark	Morgan Stanley Wealth Management	Tulsa, OK	\$658M	\$3M-10M	\$2M-15M	\$10M
152	Melissa Flammio Clark	Wells Fargo Advisors	Melbourne, FL	\$316M	\$250K-10M	\$500K-15M	\$250K
153	Heather Churchill	Morgan Stanley Wealth Management	Orlando, FL	\$627M	\$1M-7M	\$2M-20M	\$1M
154	Sarah Damsgaard	JP Morgan Securities	Chicago, IL	\$389M	\$5M-100M	\$10M-5B	\$10M
155	Carolyn Weaver	Morgan Stanley Wealth Management	Peoria, IL	\$820M	\$1M-2M	\$1M	\$500K
156	Rebekah Crouse	Merrill Lynch Wealth Management	Chambersburg, PA	\$195M	\$250K-3M	\$500K-5M	\$250K
157	Toria Scotto	UBS Financial Services	Washington, DC	\$455M	\$2.5M-8M	\$3M-10M	\$1M
158	CJ Charlebois Melendy	Ameriprise Financial Services	Williston, VT	\$251M	\$500K-1.7M	\$750K-2M	\$250K
159	Dana Pollard	Wells Fargo Advisors	Woodbury, MN	\$300M	\$500K-2M	\$1M-5M	\$0
160	Seema Khanna	Morgan Stanley Wealth Management	New York, NY	\$215M	\$20M-25M	\$20M-300M	\$5M
161	Marlynn Ma	Merrill Lynch Wealth Management	Pasadena, CA	\$461M	\$1M-10M	\$15M-35M	\$1M
162	Sallie Behnke	Morgan Stanley Wealth Management	Dallas, TX	\$801M	\$5M-50M	\$10-80M	\$1M
163	Alisa Roth	Mariner Wealth Advisors	Overland Park, KS	\$243M	\$1M-6.7M	\$1M-7M	\$0
164	Wendy Kickham	Merrill Lynch Wealth Management	Chesterfield, MO	\$265M	\$2M-3M	\$3M-5M	\$250K
165	Merle Zislin	Morgan Stanley Wealth Management	Boca Raton, FL	\$221M	\$1M-7M	\$2M-15M	\$750K
166	Heather Goodbody	Merrill Private Wealth Management	Pittsford, NY	\$652M	\$15-90M	\$7M-150M	\$5M
167	Joyce Streithorst	Frisch Financial Group	Melville, NY	\$417M	\$1M-5M	\$1.5M-7.5M	\$1M
168	Kathleen Burns	UBS Financial Services	Pasadena, CA	\$265M	\$2M-5M	\$2M-10M	\$2M
169	Laurie Tebon	Merrill Lynch Wealth Management	Waukesha, WI	\$262M	\$500K-2M	\$650K-3M	\$250K

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170	Sue Moore-Bommarito	Raymond James & Associates	Birmingham, MI	\$228M	\$5M-10M	\$3M-7M	\$2M
171	Julia Gorman	Merrill Lynch Wealth Management	Ithaca, NY	\$241M	\$1M-7.5M	\$2.5M-7.5M	\$500K
172	Stacey Harral	Merrill Lynch Wealth Management	Jonesboro, AR	\$276M	\$250K-1.5M	\$250K-1.5M	\$250K
173	Kristin Bartlow	Northwestern Mutual	Walnut Creek, CA	\$155M	\$300K-10M	\$1M-20M	\$500K
174	Kristen Scarpa Bissett	UBS Financial Services	West Palm Beach, FL	\$912M	\$25M-150M	\$5M-250M	\$5M
175	Jaime Goodman	Merrill Lynch Wealth Management	White Plains, NY	\$333M	\$1M-3M	\$2M-5M	\$500K
176	Jenny Santek	Morgan Stanley Wealth Management	Madison, WI	\$240M	\$500K-7M	\$2M-10M	\$500K
177	Winnie Sun	Sun Group Wealth Partners/LPL	Irvine, CA	\$167M	\$100K-10M	\$500K-20M	\$100K
178	Lynnea Emerson	Merrill Lynch Wealth Management	Duluth, MN	\$200M	\$400K-2.5M	\$600K-15M	\$250K
179	Barbara Blacklock	Wells Fargo Advisors	Boca Raton, FL	\$249M	\$1.2M-14M	\$1.2M-30M	\$500K
180	Jacqueline Cicale	Merrill Lynch Wealth Management	White Plains, NY	\$594M	\$2M-10M	\$2M-20M	\$1M
181	Carol Mani Johnston	UBS Financial Services	San Antonio, TX	\$164M	\$2M-15M	\$2M-12M	\$1M
182	Danielle Grande-Cosentino	Merrill Lynch Wealth Management	White Plains, NY	\$338M	\$1M-17M	\$1M-10M	\$1M
183	Angela Tarara	Wells Fargo Advisors	St. Paul, MN	\$150M	\$500K-5M	\$500K-5M	\$500K
184	Tiffany Kellner	UBS Financial Services	Miamisburg, OH	\$1.3B	\$1M-10M	\$1M-10M	\$1M
185	Teri Kelley	Morgan Stanley Wealth Management	Scottsdale, AZ	\$581M	\$1.5M-5M	\$2M-15M	\$1M
186	Kathleen Lach	UBS Financial Services	Columbus, OH	\$189M	\$2M-10M	\$3M-10M	\$500K
187	Mary Jo Harper	Merrill Lynch Wealth Management	Exton, PA	\$187M	\$1.5M-5M	\$2M-6M	\$850K
188	Cassandra Smalley	Doyle Wealth Management	St. Petersburg, FL	\$927M	\$1M-5M	\$2M-5M	\$0
189	Jennifer Sampson	UBS Financial Services	Tyler, TX	\$425M	\$1M-8M	\$1.5M-8M	\$1M
190	Rachel Kelley	Merrill Private Wealth Management	Burlington, MA	\$712M	\$2.5M-20M	\$5M-50M	\$2.5M
191	Camille Gagliardi	Ameriprise Financial Services	West Hartford, CT	\$194M	\$100K-1.5M	\$500K-2M	\$500K
192	Jenee Lister	Merrill Lynch Wealth Management	Oklahoma City, OK	\$412M	\$250K-8M	\$1.5M-8M	\$1.5M
193	Talya Bock	Merrill Lynch Wealth Management	Washington, DC	\$659M	\$500K-4M	\$400K-10M	\$250K
194	Mary L. Tomanek	Morgan Stanley Graystone	Deerfield, IL	\$3.8B	\$1M-80M	\$10M-60M	\$10M
195	Katerina Simonetti	UBS Private Wealth Management	Philadelphia, PA	\$467M	\$5M-25M	\$5M-100M	\$2M
196	Jodi Chang	Wells Fargo Advisors	Honolulu, HI	\$161M	\$1M-5M	\$1.5M-10M	\$1M
197	Kirsten Tuzzo	Merrill Lynch Wealth Management	Boca Raton, FL	\$878M	\$1.7M-8M	\$3M-10M	\$1M
198	Dawn Smith	Ameriprise Financial Services	Hopkinton, MA	\$350M	\$500K-3M	\$1M-5M	\$1K
199	Kathleen Wilson	Merrill Lynch Wealth Management	New York, NY	\$397M	\$900K-4.5M	\$1.2M-6M	\$250K
200	Kimberlee Barrett-Johnson	Ameriprise Financial Services	Charlottesville, VA	\$150M	\$650K-6M	\$1M-8M	\$500K
201	Jessica Kartzinel	UBS Financial Services	Henderson, NV	\$369M	\$1M-35M	\$1M-70M	\$1M
202	Sara Pitcel	Morgan Stanley Wealth Management	Waukesha, WI	\$620M	\$500K-35M	\$1M-50M	\$1M
203	Akiko Kamata	Merrill Private Wealth Management	New York, NY	\$397M	\$10M-35M	\$2.5M-100M	\$10M
204	Claudine Callison-Siero	Morgan Stanley Wealth Management	Little Falls, NJ	\$1.4B	\$1M-2.5M	\$2.5M-20M	\$1M
205	Jill Angstadt-Truesdell	Merrill Lynch Wealth Management	Wilmington, DE	\$1.2B	\$2M-10M	\$2M-5M	\$1M
206	Betsy Nelson	UBS Private Wealth Management	Chicago, IL	\$2.1B	\$15M-45M	\$12M-35M	\$2M
207	Jenna Carroll	Merrill Lynch Wealth Management	Newton, MA	\$391M	\$1M-50M	\$5M-30M	\$1M
208	Tracy VanDyke	Northwestern Mutual	Leawood, KS	\$231M	\$750K-8M	\$2M-10M	\$750K
209	Lechelle Moore	UBS Financial Services	Nashville, TN	\$274M	\$750K-3M	\$2M-7M	\$1M
210	Kristen Trovas	Merrill Lynch Wealth Management	Cedar Rapids, IA	\$281M	\$600K-4M	\$2M-10M	\$250K
211	Heather Krause	RBC Wealth Management	Seattle, WA	\$121M	\$1.5M-6M	\$2.5M-8.5M	\$1M
212	Samantha Parker Hopkins	UBS Financial Services	Tampa, FL	\$1.8B	\$2.4M-4.5M	\$4M-15.5M	\$1M
213	Rita McCluskey	Merrill Lynch Wealth Management	Indianapolis, IN	\$250M	\$2M	\$2.5M	\$1M
214	Shea Boulware-Creed	RBC Wealth Management	Peoria, AZ	\$205M	\$500K-10M	\$2M-10M	\$250K
215	Roz O'Connor	Morgan Stanley Wealth Management	New York, NY	\$563M	\$1M-15M	\$2M-45M	\$1M
216	Ilona Box	Raymond James & Associates	Naples, FL	\$351M	\$2M-5M	\$5M-7M	\$1M
217	Joy Kenefick	Wells Fargo Advisors	Charlotte, NC	\$509M	\$4M-8M	\$7M-10M	\$1M
218	Stephanie Smith Christiano	Merrill Lynch Wealth Management	Dover, DE	\$838M	\$600K-3.5M	\$875K-4.5M	\$0
219	Sandra Wang	Morgan Stanley Wealth Management	Palo Alto, CA	\$789M	\$1.5M-6M	\$4M-8M	\$1M
220	Sarah Springer	Baird	Anchorage, AK	\$672M	\$1.3M	\$5M	\$1M
221	Becca Brocato	Merrill Lynch Wealth Management	Austin, TX	\$569M	\$1M-10M	\$1M-10M	\$1M
222	Diane McMinds	UBS Financial Services	Napa, CA	\$348M	\$100K-2.5M	\$1M-10M	\$150K
223	Jessica Caruso	Mercer Advisors	San Francisco, CA	\$382M	\$1M-15M	\$2M-30M	\$500K
224	Nicole Drury	Morgan Stanley Wealth Management	New York, NY	\$1.4B	\$2M-20M	\$5M-50M	\$2M
225	Laurie Barry	UBS Financial Services	Chicago, IL	\$3.1B	\$500K-1.5M	\$2M-3M	\$1M
226	Sheri Billings	Merrill Lynch Wealth Management	Weston, FL	\$443M	\$2M-15M	\$2M-10M	\$1M

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RANK	NAME	FIRM	LOCATION	TEAM CUSTODIED ASSETS	TYPICAL SIZE OF HOUSEHOLDS	TYPICAL NET WORTH OF RELATIONSHIPS	MINIMUM ACCOUNT SIZE OF NEW BUSINESS
227	Marti Marache	Morgan Stanley Wealth Management	Greenwich, CT	\$176M	\$1M-5.5M	\$2M-8M	\$500K
228	Danielle Blunt	Raymond James Financial Services	Brea, CA	\$137M	\$400K-5M	\$2M-10M	\$500K
229	Megan Stirrat	Merrill Lynch Wealth Management	Irvine, CA	\$271M	\$1M-3.5M	\$2M-8M	\$1M
230	Maria Carolina Cardenas	UBS Financial Services	Coral Gables, FL	\$142M	\$1M-10M	\$2.5M-15M	\$1M
231	Mindy Fishel	Alex. Brown/Raymond James	San Francisco, CA	\$530M	\$15M-50M	\$5M-15M	\$1M
232	Suzanne Akian	Morgan Stanley Wealth Management	New York, NY	\$1.2B	\$3M-11M	\$3M-15M	\$2M
233	Molly Rothove	Creative Planning	Overland Park, KS	\$1.2B	\$400K-1.8M	\$1-11.2M	\$400K
234	Katy Stephens	Merrill Lynch Wealth Management	Tulsa, OK	\$216M	\$450K-3M	\$2M-8M	\$300K
235	Melissa Riven Mirabile	UBS Financial Services	Albany, NY	\$134M	\$2M-8M	\$2M-18M	\$1M
236	Carolyn Nolan	Ameriprise Financial Services	Winchester, MA	\$230M	\$100K-10M	\$500K-10M	\$0
237	Catina Koenig	Baird	Edina, MN	\$198M	\$1M-15M	\$2M-20M	\$1M
238	Sueanne Schulman	Morgan Stanley Wealth Management	New York, NY	\$154M	\$500K-4M	\$1M-10M	\$0
239	Sandra Cho	Pointwealth Capital Management	Encino, CA	\$138M	\$500K-5M	\$1.5M-7.5M	\$1M
240	Victoria Bailey	Morgan Stanley Private Wealth Management	Menlo Park, CA	\$2.3B	\$10M-500M	\$25M-500M	\$0
241	Lori Rhyner	Wells Fargo Advisors	Jackson, WY	\$215M	\$2M-5M	\$5M-7M	\$2M
242	Dana Nightingale	Obermeyer Wood Investment Counsel	Denver, CO	\$1.4B	\$2M-15M	\$5M-20M	\$1M
243	Amanda Levi	UBS Financial Services	Atlanta, GA	\$788M	\$500K-5M	\$1M-7M	\$100K
244	Elizabeth White	Merrill Lynch Wealth Management	Atlanta, GA	\$72.9B	\$1.7M-6M	\$5M-15M	\$2.5M
245	Alyson Popper	Morgan Stanley Wealth Management	Wellesley, MA	\$185M	\$300-600K	\$500K-1.5M	\$250K
246	Tammy Higgins	RBC Wealth Management	Edina, MN	\$450M	\$1M-11M	\$500K-11M	\$1M
247	Carmen Richards	Merrill Lynch Wealth Management	Miami, FL	\$198M	\$2.5M-10M	\$1M-10M	\$2.5M
248	Ashley H. Laubach	UBS Financial Services	Orlando, FL	\$138M	\$750K-2M	\$750K-2M	\$250K
249	Mary Helen Condon Moore	Merrill Lynch Wealth Management	Charleston, SC	\$500M	\$500K-5M	\$2M-7M	\$250K
250	Jennifer Dallas	Morgan Stanley Wealth Management	Barrington, IL	\$158M	\$250K-15M	\$250K-15M	\$250K
251	Katie DeMarco	UBS Financial Services	New York, NY	\$193M	\$500K-1M	\$2.5M-10M	\$100K
252	Sharon Hayut	Morgan Stanley Wealth Management	New York, NY	\$254M	\$500K-50M	\$1M-10M	\$500K
253	Shawna Such	Merrill Lynch Wealth Management	Carlsbad, CA	\$238M	\$1.2M-10M	\$2.5M-15M	\$1M
254	Dawn Starks	Starks Financial Group/Raymond James	Asheville, NC	\$171M	\$500K-2.5M	\$500K-2.5M	\$100K
255	Brittany Hartnett	Merrill Lynch Wealth Management	Atlanta, GA	\$72.9B	\$1.5M-5M	\$2.5M-7M	\$3M
256	Nelrae Ali	Wells Fargo Advisors	Jacksonville, FL	\$156M	\$500K-45M	\$1M-50M	\$500K
257	Lisa Wolf	Morgan Stanley Wealth Management	New York, NY	\$1.2B	\$20M-50M	\$25M-50M	\$10M
258	Kimberlee Bouska	Addison Avenue Investment Services/Raymond James	Beaverton, OR	\$167M	\$475K-1M	\$750K-1.5M	\$200K
259	Liz Poplin	Merrill Lynch Wealth Management	Northbrook, IL	\$848M	\$1M-20M	\$1M-20M	\$0
260	Eva Marina Ovejero	Morgan Stanley Wealth Management	Miami, FL	\$278M	\$3M-21M	\$33M-107M	\$2M
261	Heather Henn	Merrill Lynch Wealth Management	Atlanta, GA	\$295M	\$1.5M-10M	\$2M-20M	\$500K
262	Michelle Berry	Raymond James Financial Services	Granbury, TX	\$148M	\$150K-20M	\$500K-25M	\$1M
263	Lisa M. Seigel	Merrill Lynch Wealth Management	Miami, FL	\$234M	\$1M-5M	\$4M-10M	\$2.5M
264	W. Janet Dougherty	Cresset	Chicago, IL	\$803M	\$15M-25M	\$20M-50M	\$10M
265	Kathleen Allison	Morgan Stanley Wealth Management	Rochester, MN	\$303M	\$500K-31M	\$500K-15M	\$250K
266	Christine Emond	Ameriprise Financial Services	Fairfax, VA	\$454M	\$850K-12M	\$1.5M-15M	\$0
267	Casey Kriedman	UBS Financial Services	New York, NY	\$1.4B	\$5M-75M	\$10M-1B	\$2M
268	Tamara Lowenberg	Creative Planning	El Dorado Hills, CA	\$307M	\$400K-525K	\$1M-1.8M	\$400K
269	YC Lama	Morgan Stanley Wealth Management	Beverly Hills, CA	\$221M	\$1M-7M	\$5M-30M	\$1M
270	Sarah Tiedt	Mariner Wealth Advisors	Overland Park, KS	\$236M	\$5M-20M	\$10M-50M	\$0
271	Kristin Bloom	UBS Financial Services	Westport, CT	\$367M	\$2M-4M	\$3M-6M	\$1M
272	Lisa Thomas	Merrill Lynch Wealth Management	Austin, TX	\$144M	\$1M-8.5M	\$2.5M-15M	\$250K
273	Maureen Novak	Morgan Stanley Wealth Management	Syracuse, NY	\$532M	\$1M-10M	\$2M-20M	\$1M
274	Lacey York	Stifel	Beaver, PA	\$185M	\$350K-450K	\$500K-1M	\$250K
275	Melinda Brewer	Morgan Stanley Wealth Management	Oklahoma City, OK	\$676M	\$500K-5M	\$2.5M-10M	\$250K
276	Erin Zawisza	Merrill Lynch Wealth Management	Manasquan, NJ	\$192M	\$250K-2.5M	\$250K-4M	\$250K
277	Carrie Turcotte	Northshore Financial Strategies	Chattanooga, TN	\$143M	\$750K-2.5M	\$1M-5M	\$0
278	Marta Shen	Spring Street Financial of Raymond James	Atlanta, GA	\$162M	\$250K-10M	\$500K-50M	\$1M
279	Radhika Mehta-Sharan	Merrill Lynch Wealth Management	New York, NY	\$243M	\$500K-5M	\$1M-10M	\$1M
280	Sarah Carlson	LPL Financial/Fulcrum Financial Group	Spokane, WA	\$115M	\$500K-10M	\$1M-20M	\$0
281	Sammie Kothari Peng	Merrill Lynch Wealth Management	Brea, CA	\$1.2B	\$1M-3M	\$3M-7.5M	\$1M
282	Kimberly Cawley	Ameriprise Financial Services	Cortland, NY	\$141M	\$300K-3M	\$500K-3M	\$300K
283	Rosalie Hunter	Merrill Private Wealth Management	Philadelphia, PA	\$811M	\$50M	\$25M	\$5M

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RANK	NAME	FIRM	LOCATION	TEAM CUSTODIED ASSETS	TYPICAL SIZE OF HOUSEHOLDS	TYPICAL NET WORTH OF RELATIONSHIPS	MINIMUM ACCOUNT SIZE OF NEW BUSINESS
284	Caren Poletti Williams	Morgan Stanley Wealth Management	Nashville, TN	\$214M	\$500K-5M	\$1M-10M	\$2M
285	Sharon Alleman	UBS Financial Services	Hartford, CT	\$146M	\$1M-10M	\$1M-10M	\$1.5M
286	Rebekah Faasau	Merrill Lynch Wealth Management	Boise, ID	\$337M	\$607K-15.8M	\$1M-10M	\$800K
287	Wendy Eddy	TSG Wealth Management	Long Beach, CA	\$3.8B	\$3M-50M	\$10M-100M	\$0
288	Caryl-Lyn Mazullo	UBS Financial Services	Akron, OH	\$148M	\$500K-30M	\$1M-20M	\$500K
289	Dana Margiotta Frellick	Morgan Stanley Wealth Management	Bloomfield Hills, MI	\$121M	\$700K-2M	\$250K-5M	\$100K
290	Stephanie Zebrowski	Merrill Lynch Wealth Management	Vienna, VA	\$387M	\$500K-5M	\$500K-5M	\$250K
291	Galit Ben-Joseph	JP Morgan Securities	New York, NY	\$138M	\$5M-25M	\$5M-7M	\$0
292	Linda Cliborne	Merrill Lynch Wealth Management	Clearwater, FL	\$385M	\$750K-7M	\$3M-20M	\$1M
293	Fay DeBellis	Morgan Stanley Graystone	Minneapolis, MN	\$406M	\$2M-10M	\$15M	\$1M
294	Miye Wire	MiyeWire	Reston, VA	\$145M	\$200K-2M	\$200K-5M	\$0
295	Leba Eshaghoff	UBS Financial Services	New York, NY	\$259M	\$1M-10M	\$5M-25M	\$500K
296	Marybeth Emson	Morgan Stanley Wealth Management	Florham Park, NJ	\$526M	\$2M-7M	\$3M-10M	\$1M
297	Danielle Gilbert-Richard	Merrill Lynch Wealth Management	Burlington, VT	\$367M	\$1M-5M	\$5M	\$500K
298	Kelli Puhl	UBS Financial Services	Wayzata, MN	\$480M	\$1M-10M	\$2M-10M	\$1M
299	Jennifer W. Ibarguen	Ameriprise Financial Services	Plano, TX	\$128M	\$500K-5M	\$500K-10M	\$250K
300	Ashley Ament	Merrill Lynch Wealth Management	Scottsdale, AZ	\$340M	\$250K-2.5M	\$500K-3M	\$250K
301	Mary Ware	Wells Fargo Advisors	Charlotte, NC	\$819M	\$1M-5M	\$2M-10M	\$500K
302	Melissa Budnik	Merrill Lynch Wealth Management	Atlanta, GA	\$72.9B	\$2M-6M	\$2M-6M	\$2M
303	Marilyn Keyser	Morgan Stanley Wealth Management	Purchase, NY	\$1.1B	\$2M-5M	\$5M-10M	\$2M
304	Pamela Goodman	Merrill Lynch Wealth Management	Bala Cynwyd, PA	\$583M	\$1M-4M	\$1.5M-10M	\$250K
305	Kristin Healy	UBS Financial Services	New York, NY	\$179M	\$350K-500K	\$1M-12M	\$1M
306	Natasha Lessard	Morgan Stanley Wealth Management	Boston, MA	\$1.3B	\$2.5M-60M	\$8M-75M	\$2M
307	Lisa Angle	Merrill Lynch Wealth Management	Roanoke, VA	\$262M	\$500K-3M	\$600K-1.5M	\$500K
308	Courtney Lisecki	Morgan Stanley Wealth Management	New York, NY	\$378M	\$1.5M-25M	\$2M-25M	\$1M
309	Robyn Jensen	Ameriprise Financial Services	Brookings, SD	\$2.3B	\$100K-3M	\$1M-10M	\$50K
310	Leanne Scull	The Avenue Wealth Management Memphis/Raymond James	Memphis, TN	\$171M	\$1M-9M	\$2M-10M	\$250K
311	Alissa Hersch	Morgan Stanley Wealth Management	Seattle, WA	\$1.1B	\$1M-10M	\$2M-10M	\$1M
312	Andrea James	Wells Fargo Advisors	Clive, IA	\$234M	\$500K-25M	\$1M-25M	\$500K
313	April Oliver	Ameriprise Financial Services	Charlotte, NC	\$210M	\$500K-5M	\$1.5M-6M	\$0
314	Margarita San Juan	Merrill Lynch Wealth Management	Newport Beach, CA	\$551M	\$1M-10M	\$3M-20M	\$1M
315	Shawna Farnol Bumpus	Morgan Stanley Wealth Management	Perrysburg, OH	\$110M	\$500K-3.5M	\$500K-1.5M	\$250K
316	Jennifer Baick	Mercer Global Advisors	Bellevue, WA	\$481M	\$1M-2M	\$2M-5M	\$500K
317	Stephanie Midler	Wells Fargo Advisors	Boca Raton, FL	\$116M	\$750K-4.5M	\$1M-7.5M	\$500K
318	Mai Park	Merrill Lynch Wealth Management	Newport Beach, CA	\$182M	\$1M-2M	\$1M-3M	\$1M
319	Jennifer A. Segura	Morgan Stanley Wealth Management	Melville, NY	\$217M	\$750K-6M	\$1M-5M	\$750K
320	Shannon Harris	Ameriprise Financial Services	Richardson, TX	\$454M	\$350K-2.5M	\$500K-3M	\$0
321	Jennifer Kraus	UBS Financial Services	New York, NY	\$438M	\$3M-15M	\$5M-20M	\$1M
322	Asha Tangri Goldstein	Vivaldi Capital Management	Chicago, IL	\$2.3B	\$1M-15M	\$3M-25M	\$0
323	Mollie Brennan	Merrill Lynch Wealth Management	Lexington, KY	\$136M	\$1M-12M	\$3M-1M	\$0
324	Vanessa Burnett	Bridge Advisory	Pasadena, CA	\$455M	\$1M-5M	\$2M-10M	\$500K
325	Lisa Thorpe	Wells Fargo Advisors	Saint George, UT	\$215M	\$500K-10M	\$500K-10M	\$500K
326	Kasia Anthis	Ameriprise Financial Services	East Syracuse, NY	\$121M	\$100K-3M	\$200K-3.5M	\$50K
327	Jennifer Torrey	Northwestern Mutual	Raleigh, NC	\$210M	\$400K-1M	\$500K-5M	\$0
328	Trish McGinty Kelley	UBS Financial Services	Westlake, OH	\$667M	\$1M-5M	\$5M-10M	\$1M
329	Alisa Chanpong	Merrill Lynch Wealth Management	Pasadena, CA	\$142M	\$500K-5M	\$1M-10M	\$500K
330	Felicia Di Silvestro	Morgan Stanley Wealth Management	Chicago, IL	\$346M	\$3M-7M	\$5M-10M	\$1M
331	Carrie Gallaway	YorkBridge Wealth Advisors	New York, NY	\$852M	\$1M-10M	\$2M-25M	\$500K
332	Denise Turner	Merrill Lynch Wealth Management	Newport Beach, CA	\$166M	\$1M-5M	\$250K-5M	\$250K
333	Kimberly Evans	Wells Fargo Advisors	Atlanta, GA	\$160M	\$2M-30M	\$10M-75M	\$500K
334	Michelle Morales	Merrill Lynch Wealth Management	Ontario, CA	\$304M	\$750K-8M	\$2M-15M	\$250K
335	Beth Jeter Hrubala	Raymond James Financial Services	Spartanburg, SC	\$147M	\$500K-2.5M	\$1M-5M	\$250K
336	Lori Villegas	Morgan Stanley Wealth Management	Baltimore, MD	\$105M	\$750K-5M	\$1M-15M	\$500K
337	Kelly Bramel	Merrill Lynch Wealth Management	Miamisburg, OH	\$777M	\$250K-13M	\$250K-13M	\$250K
338	Stephanie Harris	S Harris Financial Group/Raymond James	San Antonio, TX	\$135M	\$1M-8M	\$1.5-20M	\$0
339	Christina Schatz	Morgan Stanley Wealth Management	New York, NY	\$693M	\$5M-25M	\$5M-50M	\$0
340	Kristi Braun	Merrill Lynch Wealth Management	Schaumburg, IL	\$378M	\$1M-4.5M	\$1M-8M	\$500K

TOP WEALTH ADVISOR MOMS 2020

RANK	NAME	FIRM	LOCATION	TEAM CUSTODIED ASSETS	TYPICAL SIZE OF HOUSEHOLDS	TYPICAL NET WORTH OF RELATIONSHIPS	MINIMUM ACCOUNT SIZE OF NEW BUSINESS
341	Katrina Consiglio	Wells Fargo Advisors	Albany, NY	\$219M	\$500K-1M	\$1M-6M	\$500K
342	Holly Stallworth	Raymond James Financial Services	Henrico, VA	\$154M	\$500K-3M	\$100K-10M	\$500K
343	Katrina Leali	Merrill Lynch Wealth Management	Peoria, IL	\$495M	\$500K-1.5M	\$800K-2M	\$400K
344	Anna White	Ameriprise Financial Services	Alcoa, TN	\$760M	\$200K-4M	\$250K-4M	\$0
345	Kate Salsman	Morgan Stanley Wealth Management	Lexington, KY	\$261M	\$1M-5M	\$3.5M-15M	\$750K
346	Michelle Heide	Ameriprise Financial Services	Clinton, NJ	\$162M	\$525K-5M	\$1.5M-8M	\$500K
347	Joan Bowers	Antietam Wealth Management/Raymond James	Hagerstown, MD	\$102M	\$5K-3M	\$50K-7.5M	\$5K
348	Lisa Amster	Morgan Stanley Private Wealth Management	Los Angeles, CA	\$1.6B	\$10-100M	\$20M-200M	\$5M
349	Kim Potvin	Merrill Lynch Wealth Management	New York, NY	\$1B	\$1M-4M	\$2M-20M	\$500K
350	Kylie Strum	RBC Wealth Management	Rochester, MN	\$251M	\$500K-5M	\$1M-15M	\$500K
351	Luz Rosado	Merrill Lynch Wealth Management	Bronx, NY	\$960M	\$1M-149M	\$3M-50M	\$500K
352	Dana Macaluso	UBS Financial Services	New York, NY	\$762M	\$750K-6M	\$3M-20M	\$750K
353	Melanie Walton	Morgan Stanley Wealth Management	Duluth, GA	\$138M	\$1M-5M	\$2.5M-5M	\$1M
354	Erika Puzik	Ameriprise Financial Services	Los Angeles, CA	\$115M	\$500K-5M	\$1M-10M	\$50K
355	Nadia Goldstein	Merrill Lynch Wealth Management	Westlake Village, CA	\$477M	\$500K-6M	\$6M-10M	\$250K
356	Elizabeth Stokes	Ameriprise Financial Services	Minneapolis, MN	\$672M	\$100K-4.3M	\$500K-1.2M	\$500K
357	Jill Spatola	Merrill Lynch Wealth Management	Hingham, MA	\$216M	\$1M-5M	\$1.5M-5M	\$400K
358	Stephanie Saunders	Morgan Stanley Wealth Management	Easton, MD	\$1.1B	\$1M-3M	\$5M-10M	\$1M
359	Shirley Thompson	Merrill Lynch Wealth Management	Temecula, CA	\$901M	\$500K-2M	\$2M-5M	\$250K
360	Noel Brown	Morgan Stanley Wealth Management	Honolulu, HI	\$286M	\$2M-20M	\$2M-20M	\$0
361	Amy Roof	Wells Fargo Advisors	Paducah, KY	\$543M	\$250K-75M	\$1M-130M	\$250K
362	Michelle Kish	Merrill Lynch Wealth Management	Pittsburgh, PA	\$302M	\$250K-30M	\$350K-35M	\$250K
363	Lauren Pearson	Somerset Advisory at Hightower	Birmingham, AL	\$113M	\$675K-11.5M	\$1.6M-80M	\$1.5M
364	Katherin Romero	Merrill Lynch Wealth Management	Princeton, NJ	\$267M	\$250K-800K	\$150K-8M	\$250K
365	Amanda Manske	Prime Financial Services	Brookfield, WI	\$315M	\$350K-1.2M	\$500K-1.5M	\$0
366	Blythe Manson	UBS Financial Services	Bellevue, WA	\$133M	\$800K-5M	\$800K-5M	\$100K
367	Jennifer Hersh	Merrill Lynch Wealth Management	Scottsdale, AZ	\$465M	\$1M-5M	\$500K-10M	\$250K
368	Patti Koogler	Ameriprise Financial Services	Waynesboro, VA	\$154M	\$150K-1.8M	\$400K-3M	\$25K
369	Sally Cai	Merrill Lynch Wealth Management	New York, NY	\$824M	\$1M-5M	\$3M-15M	\$1M
370	MaryAnn Pietromonaco	Morgan Stanley Wealth Management	Cincinnati, OH	\$231M	\$500K-1M	\$800K-5M	\$500K
371	Mary Batcha	Merrill Lynch Wealth Management	Jenkintown, PA	\$302M	\$1M-30M	\$1M-12M	\$1M
372	Laura Christofferson	Alden Capital Management/Raymond James	Bellevue, WA	\$235M	\$500K-5M	\$1M-30M	\$500K
373	Jennifer O'Donnell	Wells Fargo Advisors	Williamsville, NY	\$161M	\$150K-2M	\$100K-350K	\$0
374	Darlene Michelson	Merrill Lynch Wealth Management	Camp Hill, PA	\$148M	\$200K-1M	\$250K-1.2M	\$250K
375	Meredith Parrish	Morgan Stanley Private Wealth Management	West Des Moines, IA	\$1B	\$5M-20M	\$10M-50M	\$10M
376	Susan L. Wilson	Merrill Lynch Wealth Management	Burlington, MA	\$487M	\$500K-6.1M	\$850K-19M	\$1M
377	Natalie Barron	UBS Financial Services	Seal Beach, CA	\$770M	\$500K-3.5M	\$1M-6M	\$500K
378	June Brown	Baird	Madison, WI	\$195M	\$1M-5M	\$2M-10M	\$500K
379	Jennifer Shylder	Merrill Lynch Wealth Management	Las Vegas, NV	\$838M	\$500K-3M	\$1M-10M	\$250K
380	Gracelyn Root	Wells Fargo Advisors	Westlake Village, CA	\$160M	\$1M-5M	\$2M-10M	\$1M
381	Lauren De Simone	Morgan Stanley Wealth Management	New York, NY	\$350M	\$2M-8M	\$2.5M-8M	\$1M
382	Kelly Rindock	Raymond James & Associates	Center Valley, PA	\$185M	\$500K-5M	\$1M-7M	\$50K
383	Misty Jones	UBS Financial Services	Napa, CA	\$764M	\$500K-6M	\$1M-10M	\$500K
384	Natasha Bonelli	Merrill Lynch Wealth Management	Woodland Hills, CA	\$353M	\$500K-20M	\$2M-10M	\$0
385	Molly Cloud	Morgan Stanley Wealth Management	Franklin, TN	\$335M	\$1M-350M	\$2M-300M	\$1M
386	Amy Sorrels	Merrill Lynch Wealth Management	St. Paul, MN	\$292M	\$750K-2M	\$1.5M-6M	\$500K
387	Shalene Caldwell	Wells Fargo Advisors	Portland, OR	\$380M	\$1M-5M	\$1M-100M	\$750K
388	Stephanie Franchini	Morgan Stanley Wealth Management	Westport, CT	\$1.8B	\$250K-5M	\$500K-5M	\$500K
389	Nalini Dhar	Merrill Lynch Wealth Management	New York, NY	\$348M	\$500K-35M	\$2M-15M	\$250K
390	Sarah Kaplan	Kaplan Financial Group	Rockville, MD	\$242M	\$500K-5M	\$1M-10M	\$100K
391	Stuart Richards Pfeiffer	Morgan Stanley Wealth Management	Charlotte, NC	\$120M	\$500K-3M	\$1M-5M	\$1M
392	Katie Solvesky	Merrill Lynch Wealth Management	Canfield, OH	\$1.1B	\$1M-25M	\$3M-35M	\$0
393	Kimberly Melletat	Raymond James & Associates	Birmingham, MI	\$401M	\$5M-50M	\$1M-50M	\$1M
394	Julie Winston	Morgan Stanley Wealth Management	Wellesley, MA	\$769M	\$700K-12M	\$1M-18M	\$1M
395	Kristin Fishbaugh	Mariner Wealth Advisors	Cincinnati, OH	\$190M	\$1M-3M	\$1.5M-8M	\$1M
396	Christine Satterfield	Wells Fargo Advisors	Asheville, NC	\$359M	\$1M-5M	\$1.2M-5M	\$1M
397	Adrienne Snapp	Ameriprise Financial Services	Wayland, MA	\$135M	\$150K-5M	\$1M-10M	\$150K

TOP WEALTH ADVISOR MOMS 2020

RANK	NAME	FIRM	LOCATION	TEAM CUSTODIED ASSETS	TYPICAL SIZE OF HOUSEHOLDS	TYPICAL NET WORTH OF RELATIONSHIPS	MINIMUM ACCOUNT SIZE OF NEW BUSINESS
398	Diane Kessler	Citi Personal Wealth Management	Bethesda, MD	\$397M	\$500K-5M	\$1M-10M	\$200K
399	Sabina Sewillo	Morgan Stanley Wealth Management	Chicago, IL	\$758M	\$2M-8M	\$1M-6M	\$1M
400	Jill Lawrence	Ameriprise Financial Services	Minnetonka, MN	\$711M	\$900K-5M	\$2M-10M	\$800K
401	Kim Cutler	Morgan Stanley Wealth Management	Torrance, CA	\$679M	\$250K-5M	\$250K-25M	\$250K
402	Michelle Mabry	Client 1st Advisory Group	Hattiesburg, MS	\$157M	\$750K-1.5M	\$1M-10M	\$500K
403	Cierra Walding	Ameriprise Financial Services	Fort Dodge, IA	\$678M	\$250K-1.5M	\$500K-3M	\$100K
404	Andrea Pfeffer	Morgan Stanley Wealth Management	Aventura, FL	\$644M	\$3M-40M	\$10M-50M	\$2M
405	Kara Museler	UBS Financial Services	Newport, RI	\$556M	\$1M-15M	\$5M-50M	\$2M
406	Rebecca Miller	Morgan Stanley Wealth Management	Houston, TX	\$524M	\$500K-5M	\$1M-7M	\$500K
407	Carolyn Hemann	Ameriprise Financial Services	Los Angeles, CA	\$180M	\$500K-25M	\$1.5M-45M	\$500K
408	Jessica Culppepper	Creative Planning	Overland Park, KS	\$1.2B	\$400K-1.9M	\$1M-14.4M	\$400K
409	Renee Hof-Lacey	Morgan Stanley Wealth Management	Birmingham, MI	\$431M	\$500K-30M	\$500K-3M	\$500K
410	Lori Gervais	Baird	Mequon, WI	\$637M	\$2M-10M	\$2M-15M	\$2M
411	Tara Cunningham	Ameriprise Financial Services	Tampa, FL	\$200M	\$600K-5M	\$2M-15M	\$100K
412	Jennifer Murray	Morgan Stanley Wealth Management	Santa Maria, CA	\$414M	\$400K-5M	\$1M-10M	\$250K
413	Roxana Corla	Merrill Lynch Wealth Management	Miami, FL	\$297M	\$750K-5M	\$250K-10M	\$250K
414	Karen Keusayan	Wells Fargo Advisors	Los Angeles, CA	\$1.6B	\$3M-20M	\$15M-50M	\$1M
415	Phoebe Venable	CapWealth	Franklin, TN	\$873M	\$1M-3.5M	\$3M-6.7M	\$750K
416	Christine Ingesson	Morgan Stanley Wealth Management	Santa Cruz, CA	\$291M	\$1.6M-2.5M	\$2.5M-3.5M	\$500K
417	Limei Yu	UBS Financial Services	Chicago, IL	\$874M	\$1M-30M	\$1M-50M	\$1M
418	Paula Steinberg	JP Morgan Securities	New York, NY	\$3.4B	\$2M-10M	\$10M-75M	\$2M
419	Kerri Connellan	Morgan Stanley Wealth Management	New York, NY	\$634M	\$2M-7M	\$2M-15M	\$2M
420	Ashley McHarrie	Merrill Lynch Wealth Management	Beverly, MA	\$2.2B	\$1M-15M	\$1M-20M	\$250K
421	Holley Kenyon	Wells Fargo Advisors	Alpharetta, GA	\$88M	\$250K-5M	\$1M-5M	\$250K
422	Kathryn Longo	Morgan Stanley Wealth Management	Manchester, NH	\$749M	\$1M-10M	\$1M-10M	\$1M
423	Valerie Leonard	Grinkmeyer Leonard Financial	Birmingham, AL	\$247M	\$250K-7.2M	\$1.5M-15M	\$100K
424	Laura Cusenbary	Wells Fargo Advisors	Steamboat Springs, CO	\$484M	\$1M-3M	\$5M-7M	\$500K
425	Sandy Poon-Wing	Morgan Stanley Wealth Management	Melville, NY	\$303M	\$500K-15M	\$2M-4M	\$500K
426	Stevie Green	Spencer Financial Services	Liberty, MO	\$105M	\$150-500K	\$400K-2M	\$0
427	Melissa Indelicato	Ameriprise Financial Services	Waltham, MA	\$212M	\$250-750K	\$500K-5M	\$0
428	Reiko Evangelista	Wells Fargo Advisors	Burlingame, CA	\$234M	\$1M-3M	\$3M-5M	\$250K
429	Tammy Escobar-Miller	Morgan Stanley Wealth Management	Scottsdale, AZ	\$177M	\$750K-5M	\$2M-5M	\$750K
430	Ria Hart	Stifel	Boston, MA	\$418M	\$3M-20M	\$3M-40M	\$3M
431	Amy Smith	Ameriprise Financial Services	Novi, MI	\$220M	\$700K-4M	\$800K-13M	\$500K
432	Cristen Moore	Wells Fargo Advisors	Boston, MA	\$200M	\$1M-20M	\$3M-50M	\$1M
433	Lori Rabinowitz	Morgan Stanley Wealth Management	Florham Park, NJ	\$153M	\$2M-15M	\$5M-15M	\$1M
434	Margaret Wilkin	Wells Fargo Advisors	Sacramento, CA	\$198M	\$5M-50M	\$25M-750M	\$3M
435	Ginger Ewing	Ameriprise Financial Services	Inver Grove Heights, MN	\$125M	\$500K-5M	\$1M-10M	\$0
436	Julie Saumsiegle	Morgan Stanley Wealth Management	Fort Lauderdale, FL	\$150M	\$1.3M-10M	\$500K-10M	\$1M
437	Brooke McGeehan	RBC Wealth Management	Princeton, NJ	\$198M	\$250K-10M	\$750K-10M	\$250K
438	Amy Townsend	Wells Fargo Advisors	Clive, IA	\$187M	\$1M-15M	\$1M-50M	\$1M
439	Hilary J. Doherty	RBC Wealth Management	Kirkland, WA	\$322M	\$2M-8M	\$2M-15M	\$250K
440	Susan Cassell	Merrill Lynch Wealth Management	Lexington, KY	\$188M	\$400K-2M	\$400K-20M	\$400K
441	Andrea Stackland-Winterer	e3 Financial Planning	Needham, MA	\$179M	\$1M-3.5M	\$4M-7.5M	\$1M
442	Patricia Craddock	Morgan Stanley Wealth Management	Providence, RI	\$174M	\$250K-35M	\$2.5M-5M	\$1M
443	Kjersten Lazar	Raymond James & Associates	Somers, NY	\$172M	\$100K-36M	\$100K-75M	\$0
444	Linda Zimmerman	Ameriprise Financial Services	Minnetonka, MN	\$176M	\$650K-8M	\$750K-8M	\$0
445	Cathie Coleman	Baird	Abilene, TX	\$170M	\$500K-3M	\$1M-5M	\$100K
446	Danielle Aldama	Morgan Stanley Wealth Management	Palo Alto, CA	\$232M	\$2M-10M	\$1M-10M	\$0
447	Laura Blanton	Wells Fargo Advisors	Greenville, SC	\$263M	\$1M-20M	\$1M-20M	\$250K
448	Shelby Fink	Ameriprise Financial Services	Lexington, KY	\$327M	\$500K-2M	\$800K-3M	\$500K
449	Maureen Ayril	Wells Fargo Advisors	Tampa, FL	\$136M	\$2M	\$1.5M-5M	\$500K
450	Monika Windle	Financial Plan Design	La Mesa, CA	\$162M	\$250-500K	\$1M-4M	\$0
451	Becky Bridgmon	Morgan Stanley Wealth Management	Memphis, TN	\$258M	\$1M-5M	\$4M-15M	\$300K
452	Cynthia Lee	Wells Fargo Advisors	Honolulu, HI	\$126M	\$1M-17M	\$3M-30M	\$1M
453	Liza McCartney	RBC Wealth Management	Florham Park, NJ	\$249M	\$1M-10M	\$500K-10M	\$500K
454	Emily Chan	UBS Financial Services	San Francisco, CA	\$94M	\$1M-11M	\$100K-1M	\$50K

TOP WEALTH ADVISOR MOMS 2020

RANK	NAME	FIRM	LOCATION	TEAM CUSTODIED ASSETS	TYPICAL SIZE OF HOUSEHOLDS	TYPICAL NET WORTH OF RELATIONSHIPS	MINIMUM ACCOUNT SIZE OF NEW BUSINESS
455	Michelle Hughes	Morgan Stanley Wealth Management	Chicago, IL	\$507M	\$1M-3M	\$2M-5M	\$250K
456	Sandy Chism	Oppenheimer	Kansas City, MO	\$171M	\$500K-20M	\$750K-25M	\$500K
457	Elena Kochman	Morgan Stanley Wealth Management	McLean, VA	\$405M	\$1M-5M	\$750K-10M	\$1M
458	Michelle Fenaoui	Wells Fargo Advisors	McLean, VA	\$122M	\$150K-5M	\$500K-9M	\$300K
459	Samantha Price-Koontz	Merrill Lynch Wealth Management	Montvale, NJ	\$129M	\$100K-500K	\$1M-2.5M	\$500K
460	Lis McNealey Spaine	The Arlington Group Investment Consulting	Columbus, OH	\$116M	\$500K-10M	\$1.2M-30M	\$500K
461	Jen Haldemann	Baird	Milwaukee, WI	\$550M	\$1M-10M	\$2M-20M	\$100K
462	Heather Kendra	Ameriprise Financial Services	Cranston, RI	\$184M	\$500K-1.5M	\$250K-750K	\$0
463	Mary Jo White	Morgan Stanley Wealth Management	Melville, NY	\$259M	\$2M-500M	\$2M-500M	\$1M
464	Kathy Wills	Raymond James Financial Services	Redmond, WA	\$96M	\$200K-2M	\$500K-4M	\$100K
465	Courtney Burton	Merrill Lynch Wealth Management	New York, NY	\$882M	\$1M-5M	\$2M-6.5M	\$250K
466	Amber Seale	Seale Wealth Management of Raymond James	Dallas, TX	\$163M	\$1M-16M	\$2M-80M	\$1M
467	Heather Barnett	Barnett Financial Partners	Keokuk, IA	\$176M	\$250K-5.5M	\$400K-8.5M	\$250K
468	Mijanou Spurdle	Morgan Stanley Wealth Management	Miami Beach, FL	\$144M	\$5M-10M	\$2.5M-50M	\$2.5M
469	Tammie Walker	Ameriprise Financial Services	Plano, TX	\$157M	\$250K-1M	\$750K-7M	\$1M
470	Leigh Gage	Stifel	Cincinnati, OH	\$606M	\$2M-8M	\$3M-10M	\$2M
471	Nina Ingulli	Ameriprise Financial Services	Langhorne, PA	\$109M	\$250K-5M	\$500K-5M	\$100K
472	Elizabeth Camp	Morgan Stanley Wealth Management	Short Hills, NJ	\$256M	\$1M-20M	\$2M-20M	\$2M
473	Kim Chenevey	William Blair	Atlanta, GA	\$136M	\$3M-10M	\$5M-20M	\$2M
474	Kate Eiland	Wells Fargo Advisors	Fresno, CA	\$203M	\$650K	\$1.5M-5M	\$500K
476	Alissa Nance Maness	Morgan Stanley Wealth Management	Jackson, TN	\$100M	\$500K-2M	\$1M-5M	\$250K
477	Florina Shutin	Wells Fargo Advisors	New York, NY	\$108M	\$250K-7M	\$1.5M-35M	\$500K
478	Asta Muldoon	Ameriprise Financial Services	Fall River, MA	\$212M	\$250K-2M	\$250K-2M	\$250K
479	Lisa Hartung	Stifel	Newport Beach, CA	\$118M	\$1M-15M	\$3M-20M	\$500K
480	Elizabeth Eckert	Morgan Stanley Wealth Management	Indianapolis, IN	\$170M	\$250K-2M	\$1.2M-5M	\$500K
481	Aimee Daniels	Merrill Lynch Wealth Management	Pasadena, CA	\$180M	\$1M-3M	\$1.5M-4M	\$250K
482	Lisa Katterhenry Howe	Katterhenry Investment Group	Troy, OH	\$505M	\$500K-2M	\$1M-2.5M	\$750K
483	Kelly Hudak	Ameriprise Financial Services	Charlestown, MA	\$290M	\$500K-2M	\$2M-5M	\$250K
484	Jessica Osteen	Morgan Stanley Wealth Management	Miami, FL	\$488M	\$1.5M-10M	\$4M-15M	\$1M
485	Thip Zimmerman	Wells Fargo Advisors	Falls Church, VA	\$118M	\$250K-8.1M	\$800K-20M	\$500K
486	Beth Kraszewski	Keating & Associates/Raymond James	Chicago, IL	\$240M	\$1M-20M	\$2M-20M	\$0
487	Paula Dougherty	Ameriprise Financial Services	Springfield, MO	\$162M	\$500K-4M	\$1.5M-6M	\$250K
488	Jen Schneidermann	Morgan Stanley Wealth Management	Walnut Creek, CA	\$1.3B	\$1M-10M	\$3M-15M	\$2M
489	Andrea DeLapp	Ameriprise Financial Services	Salem, OR	\$492M	\$300K-2M	\$700K-5M	\$300K
490	Ichen Le	Wells Fargo Advisors	Redlands, CA	\$112M	\$500K-5M	\$3M-10M	\$250K
491	Jamie O'Rourke	Ameriprise Financial Services	Saint Cloud, MN	\$727M	\$100K-5M	\$500K-10M	\$0
492	Vanessa Garl	Morgan Stanley Wealth Management	Tampa, FL	\$228M	\$250K-500K	\$1M-3M	\$100K
493	Nicole Sennett	Sennett & Associates/Raymond James	Wilkes-Barre, PA	\$100M	\$500K-20M	\$1M-250M	\$250K
494	Katherine Brady	RNL & Associates	Rutland, VT	\$236M	\$5K-750K	\$500K-1M	\$0
495	Clare Fildes-Schwemlein	Janney Montgomery Scott	Chillicothe, OH	\$404M	\$250K-2M	\$1M-10M	\$0
496	Angela Cusmano	Dahring Cusmano and Associates	Novi, MI	\$183M	\$350K-5M	\$500K-10M	\$25K
497	Lila Marantz	Stifel	Honolulu, HI	\$181M	\$100K-500K	\$500K-2M	\$0
498	Rees Mason	Merrill Lynch Wealth Management	Ponte Vedra, FL	\$1.1B	\$1M-10M	\$1M-15M	\$500K
499	Jackie Larson	RBC Wealth Management	Minnnetonka, MN	\$825M	\$2M-20M	\$2M-25M	\$1.5M
500	Laura Berra	Wells Fargo Advisors	Raleigh, NC	\$439M	\$500K-5M	\$500K-30M	\$500K

METHODOLOGY

SHOOK Research considered women advisors with a child 21 or younger still living at home. Ranking algorithm is based on qualitative measures derived from telephone and in-person interviews and surveys: service models, investing process, client retention, industry experience, review of compliance records, firm nominations, etc.; and quantitative criteria, such as assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC. Neither SHOOK nor Working Mother receive compensation from the advisors or their firms in exchange for placement on a ranking. For more information, see shookresearch.com.