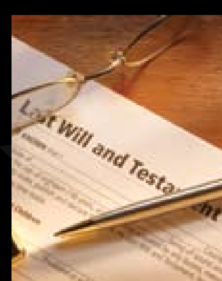
2009 INDEPENDENT SURVEY TO FIND THE BEST IN CLIENT SATISFACTION

Meet the Best

Personal Wealth Managers in the Houston Region



WEALTH MANAGER 2009 FIVE STAR℠
BEST IN CLIENT SATISFACTION

ANNOUNCING: The Houston Region's 2009 FIVE STAR Wealth Managers.

We surveyed consumers, financial service professionals and TEXAS MONTHLY subscribers to find the best in client satisfaction wealth managers in the Houston region. Here they are.

Well over half of the consumer responses in the Houston region indicated it is difficult to find a wealth manager they trust and rely on. [(1)] Wealth managers, broadly defined, are those individuals who help you manage your financial world and/or implement aspects of your financial strategies. Common examples of wealth managers are financial advisors, life insurance agents, accountants, tax advisors, attorneys, etc.

With more than 20,000 wealth managers in the Houston area, how do you find someone who listens to you, represents your interests and operates with an emphasis on integrity and service? Crescendo Business Services, an independent research firm, can help. They administered a rigorous research process to find out which wealth managers successfully satisfied key client satisfaction criteria and overall scored the highest in client satisfaction.

The Selection Process

In January, Crescendo surveyed, by mail and phone, 95,000 high-net-worth residents in the Houston region and subscribers of TEXAS MONTHLY. An additional 5,700 surveys were sent to financial services industry professionals.

On the surveys, recipients were asked to evaluate only wealth managers whom they knew through personal experience, and to evaluate them based upon nine criteria: customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting of financial objectives, post-sale service, quality of recommendations and overall satisfaction.

Only original surveys—no copies—returned in their specially designed envelopes were accepted as valid. By February, stacks of surveys had arrived and Crescendo began carefully scoring each wealth manager. Both positive and negative evaluations were included in the scoring. Only wealth managers with five years of experience in the financial services industry were considered.

Next, each wealth manager was reviewed for regulatory actions, civil judicial actions and customer complaints as reported by FINRA (the Financial Industry Regulatory Authority) and other regulatory agencies.

Then, before finalizing the list, wealth managers were reviewed by a blue-ribbon panel. The blue-ribbon panel was comprised of individuals from within the financial services industry. Although panelist comments were incorporated into the final score, safeguards were built into the review process to reduce the ability of panel members to influence the composition of the final list on the basis of company affiliation.

Best in Client Satisfaction

The resulting list of 2009 FIVE STAR Wealth Managers is an elite group, representing less than 2 percent of the wealth managers in the Houston area. Only 393 of the top-scoring wealth managers made this year's list. To make the list more user-friendly, wealth managers have been grouped based upon their primary financial service. Each wealth manager has also listed up to three additional financial services that they provide their clients.

Although this list will certainly be a useful tool for anyone looking for help in managing their financial world or implementing aspects of their financial strategies, it should not be considered exhaustive. Undoubtedly, there are many other excellent wealth managers who, for one reason or another, are not on this year's list.

Research Declarations:

As with any research or recognition program, it is important that we provide you the following declarations:

- **The 2009 FIVE STAR Wealth Managers do not pay a fee to be included in the research or the final list of FIVE STAR: Best in Client Satisfaction Wealth Managers.**
- The overall evaluation score of a wealth manager reflects an average of all respondents and may not be representative of any one client's evaluation.
- The FIVE STAR Award is not indicative of the wealth managers' future performance.
- Wealth managers may or may not use discretion in their practice and therefore may not manage their client's assets.
- The inclusion of a wealth manager on the FIVE STAR Wealth Manager list should not be construed as an endorsement of the wealth manager by Crescendo Business Services or TEXAS MONTHLY.
- Working with a FIVE STAR Wealth Manager or any wealth manager is no guarantee as to future investment success nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by Crescendo in the future.
- The research process for the FIVE STAR: Best in Client Satisfaction Wealth Manager Program, managed by Quantitative Market Intelligence (QMI), incorporates a statistically valid sample in order to identify the wealth managers in the local market that score highest in client satisfaction. QMI does not include wealth managers on the list unless their score is statistically valid. At least fifty percent of the wealth managers in the market have a statistically valid score.
- For more information on the FIVE STAR Award and the research/selection methodology, go to: fivestarprofessional.com/wmresearch.

[(1)] 2009 Consumer Survey, Quantitative Market Intelligence

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ACCOUNTING

Anita M. Cavallo
Mitchell & Cavallo
TX

Jerry Paul
Jerry T. Paul
BP, TX

BANKING

Jim Hamilton
Ross Banks May Cron and Cavin
BP, IV

Tami Savage
Prosperity Bank

Wayne Schomburg
Citizens State Bank
BP, FP, IV

Mitchell Schulman
Icon Bank

BUSINESS PLANNING

Herbert R. Flowers
Princor Financial Services Corporation
IN, IV

Danford Meischen
Merrill Lynch
BK, FP, IV

Richard Schwartz
Schwartz Junell Greenberg & Oathout
FP, IN

Keith Stanley
Fairchild, Price, Haley & Smith
EP, WP

ESTATE PLANNING

Karen Aikens
Riddle, Butts & Akiens
BP, TX, WP

Sally Andrews
Sally S. Andrews
BP, CG

Randy Beck
Beck James R., Attorney
WP

Roger Beck
FizerBeck
TX, WP

James Billings
MML Investors Services
FP, IN, IV

Tamorah Christine Butts
Riddle & Associates
BP, CG, WP

Stephen Dyer
Baker Botts
BP, TX, WP

Karen S. Gerstner
Karen S. Gerstner & Associates
CG, TX, WP

Polly P. Lewis
Lewis & Lewis Attorney at Law
BP, WP

Bernard Mathews III
The Vacek Law Firm
CG, WP

W. Cameron McCulloch, Jr.
MacIntyre & McCulloch
TS, WP

Michele O'Brien
Law Office of Michele O'Brien
BP, WP

Norma Petrosewicz
Norma Montalvo Petrosewicz
TX, WP

Carole Reed
Chamberlain Hrdlicka White Williams & Martin
TX, WP

Michael Riddle
Riddle, Butts & Akiens
BP, CG, TX

Jerry Scroggins
FizerBeck
TX, WP

John H. Jack Stibbs, Jr.
Stibbs & Company
BP, WP

John Robert Weatherly, Jr.
Weatherly & Weatherly
BP, TX, WP

FINANCIAL PLANNING

Charles Alvarez
UBS Financial Services
CG, EP, IV

Rudolph Ammer
New England Financial
IN, IV, LC

Debbie Andrews
Andrews Financial Services
BP, IN, IV

Frank Bagrier
UBS Financial Services
EP, IN, IV

Thomas Baird
Veritas Wealth Management
EP, IN, IV

Cynthia Barnett
IMG Financial Group
BP, IN, IV

Audree Begay
Ameriprise Financial
BP, EP, IV

Laurie Benchot
Chase Investment Services

Daniel Bender
Johnson Bender & Company
EP, IV

Scott Bishop
Sound Financial Solutions
BP, EP, IV

James Blackwell
James E. Bashaw & Company
IN, IV

James Bashaw
James E. Bashaw & Company

Dean L. Boebinger
King Investment Advisors
CG, EP, IV

Scott Bolton
RBC Capital Markets
BP, EP, IV

Keith Borgfeldt
Goheen Financial Group
EP, IN, IV

Lantz Bowman
Ronald Blue & Company/ Everyday Steward
CG, EP, IV

Anita Bowman-McCormick
Edward Jones
CG, IV, LC

Alfred "Trey" Brady III
Stavis, Margolis Advisory Services
EP, IN, IV

Ron Briggs
Briggs Lancaster & Siebert

Cynthia Broughton
Ameriprise Financial
IN, IV

Benjamin Brown
UBS Financial Services
EP, IV

Gregory Buchai
LPL Financial
EP, IN, IV

Cathy M. Buchanan
Ameriprise Financial
IN, IV

Lee Bull
Chase Investment Services
IN, IV, LC

Peggy Busby
UBS Financial Services
EP, IN, IV

Amy Cagle
Morgan Stanley Smith Barney
EP, IN, IV

Brett Carleton
Heritage Wealth Management
EP, IV

Rose Caskey
State Farm Insurance
BK, IN, IV

Brent Chappell
Merrill Lynch
IV

William G. Christian, Jr.
Capital Financial Planning Group
EP, IN, IV

Don Cox
Cox Global Associates
BP, IV

Charles W. Bill Crowl
Crowl and Associates
BP, EP, TX

Brent Dickerson
Heritage Wealth Management
IV

Beth Dickson
Four Seasons Financial Planning
EP

Donnie Dishaw
UBS Financial Services
IV

Charles Dixon
Dixon & Co. CPA's Wealth Managers
AC, EP

Carolyn Douglas
Linscomb & Williams
BP, EP

Sharon Duncan
Selah Financial Services
EP, IV, LC

Barry Ellis
Ameriprise Financial/Ellie & Ellis
EP, IN, IV

Byron Ellis
Ameriprise Financial/Ellie & Ellis
EP, IN, IV

Kerwyn Escayg
Ameriprise Financial
BP, EP, IV

Keith Fenstad
Tanglewood Wealth Management
EP

Darren Fenz
Merrill Lynch
EP, IV

Kevin Fink
Wealth Design Group
IN, IV, LC

Micheal Fisher
Merrill Lynch
BK, BP, IV

Michael J. Fitzgerald
Retirement Planning Houston/Fitzgerald Financial Partners
BP, IV, TX

James Fox
Merrill Lynch
CG, EP, IV

Bob Frater
Houston Asset Management

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FINANCIAL PLANNING

Andrew T. Gardener
Tanglewood Legacy Advisors
BP, EP, IV

Edward Gardner
Spoke/Royal Alliance
EP, IV

Michael Garofalo
ING Financial Partners
EP, IN, IV

John Gascoyne
Morgan Stanley Smith Barney
EP, IV, TS

Russell Gebhard
Sovereign Investment Group
EP, IV, TS

Margo Geddie
Morgan Stanley Smith Barney
EP, IN, IV

William Gouldin
Morgan Stanley Smith Barney
CG, EP, IV

William Green
Green/White Advisors
IV, LC

William Hagen
Economic Horizons
IN, IV

Diane Halloway
Halloway & Associates
IV, LC, TX

Dean Harman
Harman Wealth Management
EP, IN, IV

Lynn Harris
Merrill Lynch
BP, IV, TS

Larry Harvey
Harvey Financial Group
EP, IV

Dale Hearn
Strategic Financial Advisors
EP, IN, IV

Adam Heghinian
Edward Jones
BP, IN, TS

Susan Heuer
Merrill Lynch
EP, IV, TS

FINANCIAL PLANNING

Richard Hollis
Houston Asset Management
EP, IN, IV

Ruben W. Hope III
Edward Jones
IV, LC

Keith Huber
Huber Cardono Moring & Richter
BP, EP, IV

Keith D. Huff
Hollis Huff Lewis Financial Services
EP, IV, TX

Robert Huntley
Wise$Counsel
EP, IN, IV

Derek Irish
Ronald Blue & Company
CG, EP, IV

Bill Jameson
WJ Interests
BP, EP, IV

Jared Jameson
WJ Interests
BP, EP, IV

Willis Johnson
Johnson Bender & Company
EP, IV

Anna Jones
Patriot Wealth Management
BP, EP, IV

Jack Jones
Robare & Jones Asset Managers
EP, IN, IV

J.D. Joyce
UBS Financial Services
EP, IV

Jeff Judah
Ameriprise Financial
BP, EP, IV

Michael Karchmer
UBS Financial Services
BP, EP, IV

Andrew Keller
Houston Wealth Strategies
EP, IN, IV

David Key
Amegy Investments
BK, EP, IV

FINANCIAL PLANNING

Charles Kitzman
Morgan Stanley Smith Barney
CG, EP, IV

Lori Klein
Klein Financial Services
AC, EP, LC

Larry Knowles
Patriot Wealth Management
BP, EP, IV

Paul W. Koerner
Ameriprise Financial
IN, IV, LC

A. Gary Kovacs
UBS Financial Services
EP, IN, IV

Raya P. Kulkarni
Ameriprise Financial
BP, EP, IV

David G. Lampe
Lampe and Son Wealth Management
BP, EP, IV

Bert Langdon
Raymond James Financial Services
EP, IN, IV

Harold Le Sage, Jr.
UBS Financial Services
CG, EP, IV

Nat Levy
McNeil Levy & Friedman
CG, EP, IV

Christopher R. Manske
Merrill Lynch Global/Private Client Group
IV, TS

Mary Margolis
Stavis, Margolis Advisory Services
EP, IN, IV

Cameron McLeroy
Bank of America
EP, IN, IV

Louis Merkle
Merkle Financial Group
EP, LC, TS

Brian Messier
Messier Financial Advisors
BP, EP, IV

Rebecca Miller
Ameriprise Financial
EP, IN, IV

FINANCIAL PLANNING

Keith Mitcham
Strategic Financial Advisors
IN, IV

Craig Narum
Trisperity Wealth Advisory Group
AC, BP, IV

Ali Nasser
Eagle Strategies
EP, IN, IV

Douglas Neal
Neal Financial Group
CG, IN, IV

J. Allen Neuenschwander
Outlook Financial Group
EP, IV

Sandra Newman
Reap Financial Group
IN, IV, LC

Paul Palmer, Jr.
Cypress Advisory Services
BP, EP, IV

John Payne
Houston Asset Management
BP, EP, IV

Tom Pazera
Pazera Capital Management
IV

Darrell Pennington
Ameriprise Financial
BP, EP, IV

Randy Price
RBC Wealth Management
EP, IV

William Probe
Ameriprise Financial
IV

Matt Prucha
Edward Jones
EP, IN, IV

Bruce H. Quick
Ameriprise Financial
EP, IN, IV

A. Van Richards
AVR Investment Advisory Service
IN

Frank Richardson
Post Oak Financial Group
EP, IV, TS

FINANCIAL PLANNING

Ross W. Richardson
Pembroke Advisors
BP, EP, IV

Mark Robare
Robare & Jones Asset Managers
IN, IV

Michael Roma
Merrill Lynch
BP, IN, IV

C. Travis Saacke
Ameriprise Financial
IV

Michael Sachs
Wallstreet Texas
CG, IV, TS

Bryan Sauer
UBS Financial Services
EP, IV, TS

Ralph Schroeder
Ameriprise Financial
EP, IN, IV

Gus Shaw
Ameriprise Financial
BP, EP, IV

Justin F. Shaw
Advanced Financial Concepts
CG, EP, TX

Steven Shirley
IMS Securities
IN, IV, LC

Lori Siegel
UBS Financial Services
CG, EP, IV

Janie Sieglitz Kobes
Kobes Financial Planning Services
IV

Jim Sloan
Jim Sloan & Associates
EP, IN, IV

Elsie Smith
Edward Jones
EP, IV, LC

Preston Snow
Chase Investment Services
IN, IV, LC

Roger Sofer
Sofer Steiner & Assocates
EP, IN, IV

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FINANCIAL PLANNING

Loyd Stegent
Stegent Equity Advisors
IN, IV, TX

Dan Steiner
Sofer Steiner & Associates
BP, IN, IV

Wynette Stuntz
Neal financial Group
BP, IN, IV

Jeff Swantkowski
Patriot Wealth Management
BP, EP, IV

Stephen Takach
Edward Jones
IN, IV, LC

Everette Talbot
Talbot Financial
BP, IN, IV

Jeff Thibault
Morgan Stanley Smith Barney

Edna Thompsen
Edna J. Thompsen

Dana Thompson
Edward Jones
IN, IV, LC

Scott Tiras
Ameriprise Financial
BP, EP, IV

Kyle Todd
LPL Financial/Wallstreet Texas
EP, IN, TS

Donna R. Uliva
Ameriprise Financial
EP, IV

Jeffrey N. Vanover
Ameriprise Financial
BP, EP, TS

Stephen Vessels
The GMS Group

Chad Vlasak
Ameriprise Financial
BP, IN, IV

Sharon Ward
Ameriprise Financial
EP, IN, IV

Michael Wegner
Lifestyle Financial Advisors
EP, IN, IV

FINANCIAL PLANNING

James M. Whaley, Jr.
Questar Capital Corporation
EP, IV

Sandra White
Green/White Advisors
EP, IN, IV

Donald Whitehead
The Whitehead Group
EP, IN, IV

J. Harold Williams
Linscomb & Williams
BP, IV, TS

Malcolm Wooley
Lincoln Financial Advisors Corporation
EP, IN, IV

Grace S. Yung
UBS Financial Services
EP, IN, IV

Jonathan Zodin
Merrill Lynch
EP, IN, IV

INSURANCE

Homer Borgstedte
GBS Insurance Agency

Merry Davis
USI Southwest

Ron Donelson
State Farm Insurance
LC

Michael Farris
Modern Woodmen of America
BP, EP, FP

James Johnson
Nationwide Insurance
FP, IV, LC

Carol Morgan-Gohlke
Veteran's Administration

Frederick W. Prelle, Jr.
Advisors Financial Group
EP

Diane Schomburg
State Farm Insurance
BP, LC

Steven Schwartz
Synergy Wealth Partners
EP, FP, IV

Peter VanDerlofske
Polaris Benefits
IV, LC

INSURANCE

Christopher Vaughan
The Northwestern Mutual Life Insurance Company
IV, LC

T. Greg White
Allstate Insurance
FP

INVESTMENTS

Joni Abalos
Merrill Lynch
EP, FP

Magge Abraham
Sovereign Investment Group securities offered through LLP Financial
BP, EP, FP

Moe Allain
Wells Fargo Advisors, LLC

Francis Xavier Amsler
UBS Private Wealth Managment
EP, FP, TS

Michael Appelbaum
UBS Financial Services
EP, FP, IN

Dwight Arnold
Crossbridge Wealth Strategies
BP, FP, TX

Robert G. Asperger
LPL Financial/Asperger Financial Group
BP, EP, IN

Samuel Ayers
Merrill Lynch
CG, EP, FP

Shelley Baker
Edward Jones
IN, LC

Gil Baumgarten
UBS Financial Services
FP

Stephen Benotti
Wells Fargo Advisors, LLC

James P. Bevill
UBS Financial Services
EP, FP, IN

Jodie Bevill
UBS Financial Services
FP

INVESTMENTS

John M. Billingsley
Morgan Stanley Smith Barney
FP, TS

Joel Bittensky
UBS Financial Services
EP, FP, IN

Clark Blackman II
Alpha Wealth Strategies
EP, FP

Dennis L. Blackwell
LPL Financial
IN, LC

James Blake
Quant Group at Wunderlich Securities
EP, FP, IN

Jonathan Blakelock
Edward jones
FP, IN, LC

Carlos Bolano
Northwestern Mutual
EP, IN, LC

Elridge N. Bollich
Southwest Securities
FP, IN, LC

Michael Booker
Financial Synergies Asset Manangement
BP, FP, IN

Roger Bourland
Merrill Lynch
BP, EP, FP

Judy C. Bozeman
Woodway Financial Advisors
EP, FP, TS

Russell Braun
Edward Jones
IN, LC

George C. Briggs
Briggs Management and Research Company
FP

Michael Brunner
Morgan Stanley Smith Barney
FP

Harry T. Bucalo
UBS Financial Services
FP, IN, LC

INVESTMENTS

Yvonne M. Cabral
Cabral Chowdhury Investment
FP, LC

David Chatham
Wells Fargo Investments, LLC

G. Walter Christopherson
Linscomb & Williams
FP, TS

Candi Clement
Frost Brokerage Services
IN, LC, TS

Stephen Collette
JP Morgan Chase
BP, EP, FP

Paul Comstock
Paul Comstock Partners
CG, EP, FP

Rick Corbell
Morgan Stanley Smith Barney
EP, FP, LC

Bruce Crawford
Raymond James
EP, FP

Douglas Crockard
Merrill Lynch

J.J. Croix
Croix Financial
BP, EP, FP

William Crothers
Morgan Stanley Smith Barney
FP

John Dickerson
Edward Jones

Phil Dodson
Merrill Lynch/Private Banking and Investment Group
BK, EP, TS

Mark Draud
VALIC

Earl Dyke
UBS Financial Services
EP, FP, IN

Jeffrey Early
Northern Trust
BK, FP, TS

Richard Early
Early McClintic and McMillan

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INVESTMENTS

Mark E. Easley
E&G Advisors
FP

D. Leeds Eustis, Jr.
UBS Private Wealth Managment
EP, FP, TX

Greg Evans
Wells Fargo Advisors, LLC

Phillip Evans
James E. Bashaw & Company
EP, FP, IN

Craig Fecel
Merrill Lynch

Scott A. Finley
Ameriprise Financial
BP, EP, FP

Stephen Foster
Petra Benefits Financial Services
EP, FP, IN

Leslie B. Fox
RBC Wealth Management
FP, IN, LC

Jerry Franklin, Sr.
Morgan Stanley Smith Barney
EP, FP

Richard Friedman
RBC Wealth Management
EP, FP, LC

William E. Frisco
Morgan Stanley Smith Barney
CG, EP, FP

John Fry
Oppenheimer & Company

Carolyn A. Galfione
Linscomb & Williams
FP

Chris Galliano
Morgan Stanley Smith Barney
EP, FP, TS

Ted Geoca
MaxOutSavings Advisors

Randy C. Gillespie
Randy C. Gillespie & Associates
EP, FP

Mark Gladstein
Merrill Lynch
BK, FP, TS

INVESTMENTS

Matthew Goff
Matthew Goff
FP

Leonard Golub
New Capital Management
EP, FP, IN

John Goott
Investec Advisory Group
EP, FP

R. Randall Grace, Jr.
Chilton Capital Management

Marshall Graham III
Wells Fargo Advisors, LLC

Wayne Green
Morgan Stanley Smith Barney
EP, FP

Wayne Gregory
Merrill Lynch
IN, TS

Rocky Groneim
American Tax Advisors
AC, WP

Jim Grove
Grove Capital Management
FP

Jack Haire
Edward Jones
IN, LC

Waddy J. Hammond
UBS Financial Services
EP, FP

Kyle Hannah
Wells Fargo Advisors, LLC

David Hanson
First Harbor Group
EP, FP, IN

David Harris
UBS Financial Services
BK, CG, EP

Don Harris
Morgan Stanley Smith Barney
IN

Robert Hayes
Merrill Lynch
EP, FP, TS

Robert Head
Community Resource Credit Union
FP, LC

INVESTMENTS

Don Heathcott
Edward Jones
IN, LC

Bob Higley
James E. Bashaw & Company
FP, IN

Scott Hill
Kanaly Trust
EP, FP

Byron Hood
Morgan Stanley Smith Barney
BK, EP, FP

Victor Israel
Ameriprise Financial
BP, FP

Stephen Jackson
ViaQuest Financial Group
IN

Pamela Johns
Lincoln Financial Advisors/Johns Roasl & Associates
EP, FP

Lance Jones
Edward Jones
IN

Lewis Kalmans
Morgan Stanley Smith Barney

Drew Kanaly
Kanaly Trust
EP, FP, TS

Matthew Kardesch
Ameriprise Financial
BP, EP, FP

Mark Katz
UBS Financial Services
FP

Faisal David Khan
Ameriprise Advisory Services
FP

Joe Klingen
Parker Financial Advisors
EP, FP, TS

Christopher Knapp
Chilton Capital Management
FP, TS

INVESTMENTS

Dale Konicek
Magellan Investment Advisory Group
EP, FP, IN

Bob Kurtz
Raymond James Financial Services

Michael C. Kuznicki
Mandalay Financial
EP, FP, TX

Raj Lahoti
Ameriprise Financial
FP, IN, LC

Mark Lawrence
Edward Jones
FP, IN

Bryan A. Leonard
Merrill Lynch
EP, FP, IN

Phil A. Leonard
Merrill Lynch
EP, FP, IN

J. Colter Lewis
Northern Trust
CG, EP, TS

Stephen Lewis
Bernstein Global Wealth Managment
CG, FP

Irene Liberatos
Merrill Lynch
EP, FP

Howard Lorch
Wells Fargo Advisors, LLC

John Lovett
Raymond James Financial Services
CG, FP

Marilyn J. Macha
Houston Wealth Strategies
EP, FP, IN

James Mahdak
Wells Fargo Advisors, LLC

Lee Martin
Morgan Stanley Smith Barney
EP, FP, IN

Aimee McCrory
Caz Investments
EP, FP, TX

James E. McCubbin
Morgan Stanley Smith Barney
EP, FP

INVESTMENTS

Michael B. McDuffie
Northern Trust
EP, FP, TS

James McGough
Morgan Stanley Smith Barney
CG, EP, FP

Michael McMahon
Veritas Wealth Management
BP, FP, IN

Laurie McRay
McRay Money Management
FP

Brian Merrill
Tanglewood Wealth Management

John Merrill
Tanglewood Wealth Management
EP, FP, TS

Lewis Metzger
Morgan Stanley Smith Barney
BK, EP, FP

Kevin Mickan
Chasewood Wealth Management
CG, EP, IN

Shannon O. Moore
Northern Trust
BK, FP, TS

Steve Moss
UBS Financial Services
BK, IN

Sam Murray
Murray Investment Management
FP

Rich Paulson
Raymond James
IN

Jonathan Penn
Charles Schwab & Company
BK, FP, IN

Troy Perkins
Wells Fargo Advisors, LLC

Bill Perry
Edward Jones
IN, LC

Beverley Poltorak
Edward Jones
FP

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INVESTMENTS

Brent Popplewell
Lincoln Financial Advisors Corporation
EP, FP, IN

Risher Randall, Jr.
Morgan Stanley Smith Barney
EP

Gregory Reid
Telemus Capital Partners
FP

Michael Richardson
Frishberg Jordan Stewart Kaleta Advisors
FP

Renee Ricker
Wells Fargo Advisors, LLC

Donald Roberts
Woodway Financial Advisors
EP, FP, TS

W. Michael Robertson
Robertson and Associates
CG, EP, FP

H.Todd Roggen
UBS Financial Services
FP

Keith Rollins
Northwestern Mutual
EP, IN, LC

Georgi M. Rosal
Lincoln Financial Advisors Corporation
EP, IN

Richard Rosso
Charles Schwab & Company
BK, FP, IN

Jerry Roth
Thrivent Financial
EP, FP, IN

Barrett Rouse
Pin Oak Investment Advisors
FP

Michael Rudelson
Michael G. Rudelson & Company
EP, FP, IN

Mark Russell
Morgan Stanley Smith Barney
CG, EP, FP

Kevin Ruszkowski
Merrill Lynch
EP, FP

David M. Sabonghy
Ameriprise Financial
FP

Robert Samples
Morgan Stanley Smith Barney
BP, EP, FP

Marc Schindler
Pivot Point Advisors
FP

Randy Schroeder
Ronald Blue & Company
CG, EP, FP

Larry Selzer
UBS Financial Services
FP

June Shaw
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