

BARRON'S

THE DOW JONES BUSINESS AND FINANCIAL WEEKLY

www.barrons.com

APRIL 19, 2010



A year after the market rally began, investors face tricky choices. What America's best advisors see ahead.

TOP 100

Here are America's top financial advisors, as identified by *Barron's*. The ranking reflects the assets they and their teams oversee, the revenue generated for their firms and the quality of the advisors' practices. The system assigns a top score of 100 and rates the rest of the advisors by comparing them with the top-ranked advisor. Private bankers have been held off this list and will appear on their own list in the fall.

RANK '10 '09	Name	Firm	Location	Retail (Up to \$1 mil)	High Net Worth (\$1-10 mil)	Ultra-High Net Worth (\$10 mil+)	Founda- tions	Endow- ments	Institu- tional	Team Total Assets (\$mil)	Typical Account Size (\$mil)	Typical Net Worth (\$mil)
68. 65.	Randy Beeman	Robert W. Baird	Reston, Va.	•	•	•				1,867	2.5-5	3.5-7.5

(over please)

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DOWJONES

SPECIAL REPORT

With the rally in its second year, investors face some tricky decisions. What the leading financial advisors recommend.

The Top 100

By Suzanne McGee

(The following has been excerpted)

In the spring of 2009, advisors trying to repair the damage to clients' portfolios faced a straightforward decision: to bet or not to bet on a market rebound. Twelve months and some spectacular gains later, the challenge is even tougher: how to outperform, now that the easy pickings are gone.

The pros on *Barron's* seventh annual list of America's top 100 financial advisors are coming up with a variety of answers, drawing on their particular backgrounds, skill sets and market views.

The rankings are based on assets

under management, quality of the advisors' practices, and revenue the advisors generate for their firm. Investment performance is not an explicit criterion, because many advisors don't have audited results, and their clients have a wide variety of investment goals, from conservative to aggressive. But to build billion-dollar-plus businesses, as each of the 100 advisors has done, generally requires a strong long-term track record.

This list differs significantly from one we published in February, which ranked the leading advisors in each state—a total

of 1,000 in all. The new list, the result of winnowing some 700 nominations, is a nationwide ranking, with seven states represented in the top 10. Of the 100 advisors listed, 35 weren't on the list last year.

In addition to looking for fresh opportunities, the advisors are taking special care to preserve their clients' accumulated wealth. After all, most of the clients have portfolios of \$10 million to \$50 million or more, so they are at least as interested in preserving wealth as increasing it.

TOP 100

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60.	N Sanford Katz	Credit Suisse Securities	San Francisco		•	•	•			1,325	10-50	20-100
61.	N Tom Gau	Retirement Planning Spec	Ashland, Ore.	•	•					1,730	1.8	3.5
62.	55 Raj Sharma	Merrill Lynch	Boston		•	•	•	•	•	2,631	10	15-100
63.	63 Kevin Myeroff	NCA Financial Planners	Cleveland	•	•	•		•		1,028	1-5	3-10
64.	78 William Greco	UBS Financial Services	Hartford, Conn.	•	•	•			•	2,200	5	10
65.	N Nathan Bachrach	Financial Network Group	Cincinnati	•	•	•				1,185	0.65	0.75-4
66.	68 John Olson	Merrill Lynch	New York	•	•	•				2,022	2-30	5-50
67.	34 Martin Halbfinger	UBS Financial Services	New York		•	•	•		•	1,741	5-50	10-100
68.	65. Randy Beeman	Robert W. Baird	Reston, Va.	•	•	•				1,867	2.5-5	3.5-7.5
69.	67 Wm. Craig Dobbs	Graystone Consulting	Indianapolis						•	10,198	150	300+
70.	51 Bruce Lee	Credit Suisse Securities	Chicago	•	•	•	•			1,280	60	50-400



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