

## BARRON'S SPECIAL REPORT

# Top 250 Private Wealth Management Teams 2026

Our annual listing of advisory teams focused on managing the wealth of families and individuals. The ranking is based on quantitative and qualitative measures, including teams' assets under management, their revenue, and their regulatory records.

Typical Account Size Key ● Under \$5 million ▲ \$5 million-\$49 million ■ \$50 million & over

<p><b>1. 545 Group</b> Morgan Stanley Private Wealth Management Menlo Park, Calif. Key Advisors: Gregory Vaughan, Mark Douglass, Jason Bogardus ■ Typical Account (mil): \$75 Team Assets (bil): \$67.5</p>	<p><b>15. The 650 Team</b> Morgan Stanley Private Wealth Management San Francisco Key Advisors: Tim Emanuels, Rich Petit, Steve Ashley ■ Typical Account (mil): \$50 Team Assets (bil): \$17.2</p>	<p><b>29. Mainsail Wealth Partners</b> UBS Private Wealth Management Los Angeles Key Advisors: Drew Freides, Michael Kanigher, Steven Westerman ▲ Typical Account (mil): \$35 Team Assets (bil): \$9.4</p>	<p><b>43. The BHP Group</b> Morgan Stanley Private Wealth Management New York Key Advisors: Fotios Piniros, Andrew Hart, Roland Breitenecker ▲ Typical Account (mil): \$25 Team Assets (bil): \$15.3</p>	<p><b>57. Gatestone Financial Partners</b> UBS Private Wealth Management New York Key Advisors: Daniel Kilmurray, Craig Dunton, William Einstein ▲ Typical Account (mil): \$10 Team Assets (bil): \$10.5</p>	<p><b>71. Trailhead Retirement Planning Group</b> Morgan Stanley Wealth Management Chicago Key Advisors: William Easom, Dan Hoffmann, Sean Lannan ● Typical Account (mil): \$2 Team Assets (bil): \$4.6</p>
<p><b>2. The Polk Wealth Management Group</b> Morgan Stanley Private Wealth Management New York Key Advisors: Lyon Polk, Deborah Montaperto ■ Typical Account (mil): \$150 Team Assets (bil): \$288.2</p>	<p><b>16. VMT Wealth Management</b> Merrill Wealth Management Houston Key Advisors: Nestor Vicknair, Kyle Kelley, Robert Leverte ● Typical Account (mil): \$4.5 Team Assets (bil): \$9.8</p>	<p><b>30. The Westmoreland Group</b> Merrill Private Wealth Management Atlanta Key Advisors: Rod Westmoreland, Kelly Westmoreland ▲ Typical Account (mil): \$28.8 Team Assets (bil): \$6.5</p>	<p><b>44. The Capitol Wealth Management Group</b> Morgan Stanley Private Wealth Management Washington, D.C. Key Advisors: A.J. Fechter, David Gray, Donald Metzger ▲ Typical Account (mil): \$15 Team Assets (bil): \$7.8</p>	<p><b>58. The Wolfslau Group</b> Morgan Stanley Wealth Management Long Beach, Calif. Key Advisors: Karl Wolfslau, Steven Long, Robert Schwartz ● Typical Account (mil): \$0.6 Team Assets (bil): \$4.2</p>	<p><b>72. Atlas Group</b> Morgan Stanley Private Wealth Management New York Key Advisors: Scott Wilson, Crystal Ho, Reid Wilson ▲ Typical Account (mil): \$25 Team Assets (bil): \$9</p>
<p><b>3. The Malone Neuhaus Group</b> Morgan Stanley Private Wealth Management Los Angeles Key Advisors: Francis X. Malone, Jon Neuhaus ■ Typical Account (mil): \$50 Team Assets (bil): \$142</p>	<p><b>17. Global Corporate &amp; Institutional Advisory Services</b> Merrill Wealth Management Atlanta Key Advisors: Matthew Williams, Kevin Barnes, Kyle Salone ● Typical Account (mil): \$1 Team Assets (bil): \$121.2</p>	<p><b>31. Corbellini, Emanuelson, Kalyandurg &amp; Associates</b> Merrill Private Wealth Management Dallas Key Advisors: William Corbellini, Dwight Emanuelson, Raj Kalyandurg ▲ Typical Account (mil): \$35 Team Assets (bil): \$8.9</p>	<p><b>45. Treasury Partners</b> Hightower New York Key Advisors: Richard Saperstein, Steven Feit, Jerome Klein ▲ Typical Account (mil): \$25 Team Assets (bil): \$22.5</p>	<p><b>59. Stackman   Casriel Group</b> UBS Private Wealth Management New York Key Advisors: Scott Stackman, Lyle Casriel ■ Typical Account (mil): \$80 Team Assets (bil): \$9.4</p>	<p><b>73. 415 Group</b> Morgan Stanley Private Wealth Management Menlo Park, Calif. Key Advisors: Victoria Bailey, Jonathan Usich, Jonathan Harris ▲ Typical Account (mil): \$40 Team Assets (bil): \$9.1</p>
<p><b>4. The Chase Group</b> Morgan Stanley Private Wealth Management Menlo Park, Calif. Key Advisors: Andy Chase, Dan McCormick, Beth Smith ■ Typical Account (mil): \$50 Team Assets (bil): \$40.6</p>	<p><b>18. Ellison Kibler</b> Merrill Private Wealth Management Columbia, S.C. Key Advisors: Rick Migliore, Ronnie Dennis, Gordon Whittaker ▲ Typical Account (mil): \$15 Team Assets (bil): \$12.7</p>	<p><b>32. The Casanueva Group</b> Merrill Wealth Management Lakewood Ranch, Fla. Key Advisors: Dominic Casanueva, Robert Dwyer, Richard Hynes ● Typical Account (mil): \$2.5 Team Assets (bil): \$14.7</p>	<p><b>46. The Las Olas Group</b> Morgan Stanley Wealth Management Fort Lauderdale, Fla. Key Advisors: Trevor Fried, Bonnie Mitten, Jeffrey Cole ● Typical Account (mil): \$3 Team Assets (bil): \$4.6</p>	<p><b>60. The Vahab Group</b> J.P. Morgan Wealth Management Boca Raton, Fla. Key Advisors: Andrew Vahab, David Guthrie, Vincent Zappola ▲ Typical Account (mil): \$8 Team Assets (bil): \$8.9</p>	<p><b>74. The Magellan Group</b> Morgan Stanley Private Wealth Management New York Key Advisors: Richard Zinman, Griffin McQuilling, Joseph Dunn ■ Typical Account (mil): \$100 Team Assets (bil): \$10</p>
<p><b>5. Jones Zafari Group</b> Merrill Private Wealth Management Los Angeles Key Advisors: Richard Jones, Reza Zafari, Tom Tournat ■ Typical Account (mil): \$50 Team Assets (bil): \$91.6</p>	<p><b>19. Private Executive Services</b> Merrill Private Wealth Management New York Key Advisors: Andrew Kraus, Robert McGinty, Jeffrey Bryan ■ Typical Account (mil): \$54.6 Team Assets (bil): \$32.3</p>	<p><b>33. The Pacific Wealth Management Group</b> Morgan Stanley Private Wealth Management Kirkland, Wash. Key Advisors: Regan Mueller, Dale Miller, Larry Garcia ▲ Typical Account (mil): \$7 Team Assets (bil): \$7.2</p>	<p><b>47. The Warr Group</b> Morgan Stanley Private Wealth Management Tuscaloosa, Ala. Key Advisors: Michael Warr, Katie Hancock, Dusti Monk ▲ Typical Account (mil): \$20 Team Assets (bil): \$7.7</p>	<p><b>61. Rise Private Wealth Management</b> Ameriprise Financial Bedford, N.H. Key Advisors: Brent Kiley, Robert Bonfiglio, Ryan McCabe ● Typical Account (mil): \$1.5 Team Assets (bil): \$8.1</p>	<p><b>75. The Daniels Group</b> Morgan Stanley Wealth Management Menlo Park, Calif. Key Advisors: Steven Daniels, Michael Curts, Charlie Ramos ▲ Typical Account (mil): \$5 Team Assets (bil): \$10.8</p>
<p><b>6. Team Global</b> Morgan Stanley Private Wealth Management New York Key Advisors: Ron Basu, Christopher Toomey, Bart Wyand ▲ Typical Account (mil): \$25 Team Assets (bil): \$25.1</p>	<p><b>20. Team Pfeifler</b> Morgan Stanley Private Wealth Management Palm Beach, Fla. Key Advisors: Brian C. Pfeifler, Laura M. Norman ■ Typical Account (mil): \$75 Team Assets (bil): \$19.8</p>	<p><b>34. Griep/Palmer</b> Morgan Stanley Private Wealth Management San Francisco Key Advisors: Troy Griep, Richard Palmer ▲ Typical Account (mil): \$30 Team Assets (bil): \$15.4</p>	<p><b>48. Errico Partners</b> UBS Private Wealth Management New York Key Advisors: R. Christopher Errico, Adam Galaburda, Sean Kilduff ▲ Typical Account (mil): \$10 Team Assets (bil): \$7</p>	<p><b>62. Envisage Wealth</b> Ameriprise Financial Columbus, Ohio Key Advisors: Jeffery Chaddock, Adam S. Goldstein, Kerry Thompson ● Typical Account (mil): \$1.8 Team Assets (bil): \$6.7</p>	<p><b>76. Legacy Financial Partners</b> Ameriprise Financial Bismarck, N.D. Key Advisors: Joel Bird, Jason Kirchmeier, Kerry Thompson ● Typical Account (mil): \$0.8 Team Assets (bil): \$10.6</p>
<p><b>7. Kuttin Wealth Management</b> Ameriprise Financial Hauppauge, N.Y. Key Advisors: Jonathan Kuttin, Jacob D. Dunlap, Jason T. Ice ● Typical Account (mil): \$1.5 Team Assets (bil): \$15</p>	<p><b>21. The Evelo[Singer] Sullivan Bruegge Group</b> Merrill Private Wealth Management Cincinnati Key Advisors: David Singer, Kevin Bruegge, Jamie Morgan ▲ Typical Account (mil): \$25 Team Assets (bil): \$10.4</p>	<p><b>35. Montage Financial Group</b> UBS Private Wealth Management Denver Key Advisors: Jonathan Beukelman, Michael Chudd, Jeremy Keller ▲ Typical Account (mil): \$20 Team Assets (bil): \$8.1</p>	<p><b>49. The Burish Group</b> J.P. Morgan Wealth Management Madison, Wis. Key Advisors: Andrew Burish, Jason Maas ● Typical Account (mil): \$3 Team Assets (bil): \$7</p>	<p><b>63. The Sharma Group</b> Merrill Private Wealth Management Boston Key Advisors: Raj Sharma, Christian Kemp ▲ Typical Account (mil): \$15 Team Assets (bil): \$8</p>	<p><b>77. The One North Group</b> J.P. Morgan Private Wealth Management Scottsdale, Ariz. Key Advisors: Max Sanel, Eric Olson, Paul Groves ▲ Typical Account (mil): \$35 Team Assets (bil): \$5.1</p>
<p><b>8. TSG Wealth Management</b> Wells Fargo Advisors Financial Network Reno, Nev. Key Advisors: Mark Schulten, Allen Schreiber ● Typical Account (mil): \$3 Team Assets (bil): \$18</p>	<p><b>22. Wise River Advisors</b> UBS Private Wealth Management Los Angeles Key Advisors: Craig Chiate, Mark Binder, James Axelson ▲ Typical Account (mil): \$25 Team Assets (bil): \$8.8</p>	<p><b>36. Carlin Wealth Management</b> Morgan Stanley Private Wealth Management Coral Gables, Fla. Key Advisors: Adam Carlin, Jason Goldstrich, Gregg Gelber ▲ Typical Account (mil): \$12.5 Team Assets (bil): \$7.8</p>	<p><b>50. The MPW Group</b> Morgan Stanley Wealth Management Oak Brook, Ill. Key Advisors: Scott Magnesen, Lance Walker, Ryan Magnesen ● Typical Account (mil): \$2.5 Team Assets (bil): \$8.1</p>	<p><b>64. The Whitman Group</b> Morgan Stanley Wealth Management Pasadena, Calif. Key Advisors: Alan Whitman, Albie Vollero, Todd Reynolds ▲ Typical Account (mil): \$7 Team Assets (bil): \$5.3</p>	<p><b>78. The OCB Group</b> J.P. Morgan Wealth Management San Francisco Key Advisors: Greg Onken, Drew Corradini, Brian Brocius ▲ Typical Account (mil): \$25 Team Assets (bil): \$8.2</p>
<p><b>9. Zager Fixed Income Management</b> Morgan Stanley Private Wealth Management Los Angeles Key Advisors: Drew Zager, Joseph McCullough ▲ Typical Account (mil): \$10 Team Assets (bil): \$26.6</p>	<p><b>23. The Pelican Bay Group</b> Morgan Stanley Wealth Management Pittsford, N.Y. Key Advisors: Jennifer Hartmann, Heather Churchill, Jeanine Delgadillo ▲ Typical Account (mil): \$5 Team Assets (bil): \$5.3</p>	<p><b>37. The Kavalleratos Team</b> Morgan Stanley Wealth Management New York Key Advisors: Nick Kavalleratos, Maryann Kavalleratos ▲ Typical Account (mil): \$10 Team Assets (bil): \$15.9</p>	<p><b>51. The Continuum Group</b> Morgan Stanley Wealth Management New York Key Advisors: Scott Siegel, Steven Rosbash, Joseph Carmody ▲ Typical Account (mil): \$25 Team Assets (bil): \$10.2</p>	<p><b>65. The Peters Group</b> Morgan Stanley Wealth Management Purchase, N.Y. Key Advisors: Kevin Peters, Jonathan Peters, Wenton Camporin ▲ Typical Account (mil): \$17.6 Team Assets (bil): \$9.4</p>	<p><b>79. Clarity Wealth</b> Wells Fargo Advisors Financial Network Naples, Fla. Key Advisors: Keith Jacoby, Michael McCain, Don Nealon ▲ Typical Account (mil): \$5 Team Assets (bil): \$6.3</p>
<p><b>10. The Erdmann Group</b> Merrill Private Wealth Management Greenwich, Conn. Key Advisors: Jeff Erdmann, Rob Giannetti, Mark Brookfield ■ Typical Account (mil): \$50 Team Assets (bil): \$18.7</p>	<p><b>24. Team 581</b> Morgan Stanley Private Wealth Management San Francisco Key Advisors: Shane Brisbin, Michael Baumer, Spencer Larson ■ Typical Account (mil): \$50 Team Assets (bil): \$11.7</p>	<p><b>38. Ridge Crest Investment Partners</b> UBS Private Wealth Management New York Key Advisors: Russell Rabito, Reed Favley, Jordan Mahaffey ▲ Typical Account (mil): \$22 Team Assets (bil): \$12.7</p>	<p><b>52. Wilde Wealth Management Group</b> Wilde Wealth Management Group Scottsdale, Ariz. Key Advisors: Trevor Wilde, Janenne Lackey, Jeff Anthony ● Typical Account (mil): \$0.8 Team Assets (bil): \$5.6</p>	<p><b>66. Lechner Altieri McMahon</b> Morgan Stanley Private Wealth Management Boston Key Advisors: John Lechner, Terrence McMahon, Nicholas Altieri ▲ Typical Account (mil): \$25 Team Assets (bil): \$9.1</p>	<p><b>80. The Braun Elwell Group</b> Morgan Stanley Private Wealth Management Seattle Key Advisors: Dean Braun, Dana Elwell ▲ Typical Account (mil): \$35 Team Assets (bil): \$7.9</p>
<p><b>11. Wickham Cash Partners</b> UBS Private Wealth Management Charlotte, N.C. Key Advisors: Mitchell Wickham, Greg Cash, Trevor Hoke ▲ Typical Account (mil): \$25 Team Assets (bil): \$30.9</p>	<p><b>25. Chicago Tower Group</b> Morgan Stanley Wealth Management Chicago Key Advisors: Michael Gallagher, Benjamin Katz, Edwin Katz ▲ Typical Account (mil): \$5 Team Assets (bil): \$15.9</p>	<p><b>39. The Weil Group</b> Merrill Private Wealth Management New York Key Advisor: Noel Weil ■ Typical Account (mil): \$50 Team Assets (bil): \$29.7</p>	<p><b>53. The Harbor Financial Group</b> Morgan Stanley Wealth Management Boca Raton, Fla. Key Advisors: Eric Applewhite, Julie Clairmont-Shide, Ryan Ward ▲ Typical Account (mil): \$5 Team Assets (bil): \$6</p>	<p><b>67. Epstein Partners</b> UBS Private Wealth Management New York Key Advisors: Adam Epstein, Sheila Klehm, Jim New ▲ Typical Account (mil): \$35 Team Assets (bil): \$8.7</p>	<p><b>81. The KLT Group</b> Morgan Stanley Private Wealth Management Los Angeles Key Advisors: James Klein, Rick Keller, Bobby Thomason ▲ Typical Account (mil): \$20 Team Assets (bil): \$6.3</p>
<p><b>12. The Burrows Strzelecki Group</b> Morgan Stanley Private Wealth Management Garden City, N.Y. Key Advisors: Bruce Burrows, Steven Strzelecki ▲ Typical Account (mil): \$10 Team Assets (bil): \$59.3</p>	<p><b>26. The Vinder Group</b> Morgan Stanley Private Wealth Management New York Key Advisors: Ron Vinder, Amy Wood, Sofia Laffont ■ Typical Account (mil): \$75 Team Assets (bil): \$21.7</p>	<p><b>40. Katz Wealth Management</b> UBS Private Wealth Management New York Key Advisors: Jason Katz, Kenji Yoshikawa, Robert Schiff ▲ Typical Account (mil): \$20 Team Assets (bil): \$7.5</p>	<p><b>54. Arbogast Breen Giles Olmo Shaikh Group</b> Merrill Private Wealth Management San Francisco Key Advisors: Michael Breen, Brian Olmo, Hilary Giles ■ Typical Account (mil): \$50 Team Assets (bil): \$26.6</p>	<p><b>68. The New York Fourth Avenue Group</b> Morgan Stanley Wealth Management New York Key Advisors: Michael Scotto, Philip Aronoff, Patricia McGinley ● Typical Account (mil): \$2 Team Assets (bil): \$7.3</p>	<p><b>82. The Duckworth Haggerty Group</b> Merrill Private Wealth Management Pittsburgh Key Advisors: Michael Duckworth, Jennifer Haggerty, Dugan McLaughlin ▲ Typical Account (mil): \$25 Team Assets (bil): \$5.2</p>
<p><b>13. Private Family Wealth Partners</b> UBS Private Wealth Management Los Angeles Key Advisors: Ryan McClellan, Kirk Wendorf, Bill Calvert ▲ Typical Account (mil): \$35 Team Assets (bil): \$62.6</p>	<p><b>27. The Princi Group</b> Morgan Stanley Private Wealth Management Boston Key Advisors: Peter Princi, Bradley Scioletti, Michael Landers ▲ Typical Account (mil): \$17.5 Team Assets (bil): \$32.7</p>	<p><b>41. LongBernstein Wealth Management</b> UBS Private Wealth Management Dallas Key Advisors: Ryan Long, Bradford Bernstein ▲ Typical Account (mil): \$10 Team Assets (bil): \$5.5</p>	<p><b>55. The Cafaro Group</b> Merrill Private Wealth Management Wellesley, Mass. Key Advisors: Carl Cafaro, Jonathan Greer, Nicholas Cafaro ▲ Typical Account (mil): \$7.5 Team Assets (bil): \$7.5</p>	<p><b>69. Family Wealth Group</b> Morgan Stanley Private Wealth Management New York Key Advisors: Robert Stolar, John Voltaggio, Kimberley Hatchett ■ Typical Account (mil): \$75 Team Assets (bil): \$8.6</p>	<p><b>83. Alta Group</b> Morgan Stanley Wealth Management New York Key Advisors: Leo Biagini, Victor Palafox, Juan Ettinger ■ Typical Account (mil): \$50 Team Assets (bil): \$9</p>
<p><b>14. Seventy2 Capital Wealth Management</b> Wells Fargo Advisors Financial Network Bethesda, Md. Key Advisors: Thomas Fautrel, Paul Carlson ● Typical Account (mil): \$2.5 Team Assets (bil): \$14.8</p>	<p><b>28. The Fowler Group</b> Morgan Stanley Private Wealth Management Denver Key Advisors: Shawn Fowler, Gordie Weightman ▲ Typical Account (mil): \$49 Team Assets (bil): \$20.9</p>	<p><b>42. The Phil Scott Group</b> J.P. Morgan Wealth Management Bellevue, Wash. Key Advisor: Phil Scott ▲ Typical Account (mil): \$10 Team Assets (bil): \$7.2</p>	<p><b>56. Heritage Wealth Advisors</b> Ameriprise Financial Mercer Island, Wash. Key Advisors: Erin Scannell, Randall Linde, Colin Sands ● Typical Account (mil): \$4 Team Assets (bil): \$15.2</p>	<p><b>70. The Ricca Group</b> Morgan Stanley Wealth Management Morristown, N.J. Key Advisors: Michael Ricca, Mary Guza, Andrea O'Donnell ▲ Typical Account (mil): \$10 Team Assets (bil): \$7.2</p>	<p><b>84. Lake Street Private Wealth</b> UBS Private Wealth Management Wayzata, Minn. Key Advisors: Louis Close, Chris Watkins, Elizabeth Engelmann ▲ Typical Account (mil): \$12 Team Assets (bil): \$5.7</p>

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Typical Account Size Key ● Under \$5 million ▲ \$5 million-\$49 million ■ \$50 million &amp; over

**85. Wealth Partners**  
**Ameriprise Financial**  
Omaha, Neb.Key Advisor: Phil Wood  
● Typical Account (mil): \$0.5  
Team Assets (bil): \$5.7**86. The Winter Street Group**  
**Morgan Stanley Private**  
Wealth Management  
Wellesley, Mass.Key Advisors: Evan Dangel,  
Jim Greenho, John Alekna  
▲ Typical Account (mil): \$30  
Team Assets (bil): \$5**87. The 173 Group****Morgan Stanley Private**  
Wealth Management  
Menlo Park, Calif.Key Advisors: Ned Gibbons,  
Gerard Zell  
▲ Typical Account (mil): \$45  
Team Assets (bil): \$7.6**88. The Cultra Wealth**  
**Management Group**  
William Blair  
ChicagoKey Advisors: John Cultra,  
Michael Wertz, Sarah Mercurio  
▲ Typical Account (mil): \$20  
Team Assets (bil): \$6.1**89. The Rohr Group****Merrill Private Wealth**  
Management  
Wayne, Pa.Key Advisors: Peter Rohr,  
William Leckey,  
Matthew Rafferty  
▲ Typical Account (mil): \$35  
Team Assets (bil): \$8.1**90. The MDM Group****Morgan Stanley Private**  
Wealth Management  
New YorkKey Advisors: Mercedes Paratje,  
David Lew, Miguel Bacal  
▲ Typical Account (mil): \$25  
Team Assets (bil): \$7.6**91. Stiefel Bronstein Team****Neuberger Berman**  
New YorkKey Advisors: Stephanie J.  
Stiefel, Joshua A. Bronstein  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$4.4**92. Finkel Hamerling**  
**Allan Team**  
Neuberger Berman  
New YorkKey Advisor: Seth Finkel  
▲ Typical Account (mil): \$10.3  
Team Assets (bil): \$4.8**93. Panava Partners****UBS Private Wealth**  
Management  
Wayzata, Minn.Key Advisors: Robert Metcalf,  
Judy Fredrickson,  
Patrick Thompson  
■ Typical Account (mil): \$75  
Team Assets (bil): \$6.6**94. The Shalhoup Group****Merrill Wealth Management**  
New YorkKey Advisors: Michael Shalhoup,  
Christopher Battaglia,  
Kevin Reavey  
▲ Typical Account (mil): \$7  
Team Assets (bil): \$3.5**95. The Sawyer Group****Morgan Stanley Private**  
Wealth Management  
MiamiKey Advisors: Michael Sawyer,  
Andrew Sawyer, Alexandra Royer  
■ Typical Account (mil): \$50  
Team Assets (bil): \$27.2**96. The Pearce Group****Merrill Private Wealth**  
Management  
Towson, Md.Key Advisors: Kent Pearce,  
Karl Porter, Jeremy Kober  
▲ Typical Account (mil): \$20  
Team Assets (bil): \$4.1**97. The Hetherington Group****Merrill Private Wealth**  
Management  
New Canaan, Conn.Key Advisor: Brian Hetherington  
■ Typical Account (mil): \$60  
Team Assets (bil): \$6.2**98. Walters Bailey Associates****Merrill Wealth Management**  
Blue Bell, Pa.Key Advisors: Johanna Walters,  
Megan Bailey  
▲ Typical Account (mil): \$11  
Team Assets (bil): \$8.1**99. The SVS Wealth****Management Team**  
**Morgan Stanley Wealth**  
Management  
Shrewsbury, N.J.Key Advisors: Anthony Valente,  
Stephen Scanapicco,  
Patricia Glass  
● Typical Account (mil): \$1  
Team Assets (bil): \$3.6**100. 1935 Wealth****Management Team**  
William Blair  
ChicagoKey Advisors: Tom Wilson,  
Lindsey Holton, Dick Gottfred  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$8.9**101. The Lighthouse Wealth****Management Group**  
**Morgan Stanley Wealth**  
Management  
Ponte Vedra Beach, Fla.Key Advisors: Jared Pollicastro,  
Andy Baggs, Brian Stokes  
● Typical Account (mil): \$2.8  
Team Assets (bil): \$4.2**102. The McKelvy Group****Morgan Stanley Wealth**  
Management  
Menlo Park, Calif.Key Advisors: Dorian McKelvy,  
Max McKelvy  
▲ Typical Account (mil): \$8  
Team Assets (bil): \$13.8**103. The Hansberger Group****Morgan Stanley Private**  
Wealth Management  
AtlantaKey Advisors: James Hansberger,  
Morton Levey,  
John Parker Wilson  
▲ Typical Account (mil): \$25  
Team Assets (bil): \$3.3**104. One Point Wealth****Management Group**  
**Morgan Stanley Wealth**  
Management  
ChicagoKey Advisors: Andrew Griffo,  
Martha Maugh,  
Andrew Rothstein  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$8.4**105. The Sound Shore Wealth****Management Group**  
**Morgan Stanley Wealth**  
Management  
Greenwich, Conn.Key Advisors: Peter Chieco,  
Vincent Mancuso,  
Richard Lybarger  
▲ Typical Account (mil): \$10  
Team Assets (bil): \$4.6**106. Linwood Wealth****Management Group**  
Wells Fargo Advisors  
Linwood, N.J.Key Advisors: Mark Lippman,  
Christopher Cobb,  
Bryan Stein  
● Typical Account (mil): \$1.8  
Team Assets (bil): \$4.8**107. The Bromberg Group****Morgan Stanley Wealth**  
Management  
San FranciscoKey Advisors: Jesse Bromberg,  
Alex Pulido  
▲ Typical Account (mil): \$11  
Team Assets (bil): \$5.6**108. Skyeburst Wealth****Management**  
Ameriprise Financial  
Auburndale, Mass.Key Advisors: Daniel T. Wilson,  
Jaqueline Blau, Jaime Barnes  
● Typical Account (mil): \$0.6  
Team Assets (bil): \$6.5**109. NEST Capital****Wells Fargo Advisors**  
Financial Network  
Troy, OhioKey Advisors: Lisa Katterhenry Howe,  
Eric Haubert  
● Typical Account (mil): \$0.8  
Team Assets (bil): \$4.9**110. Payne & Mencias Group****Merrill Wealth Management**  
IndianapolisKey Advisors: Eric Payne,  
Ron Mencias  
▲ Typical Account (mil): \$5  
Team Assets (bil): \$3.9**111. The Bluestone Group****Morgan Stanley Private**  
Wealth Management  
New YorkKey Advisors: Dennis Cutrone,  
George Spiropoulos  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$5.1**112. Evolve Wealth****Management Group**  
**Merrill Wealth Management**  
Washington, D.C.Key Advisors: J.C. McKnight,  
Peter Kenny, George Bassett  
● Typical Account (mil): \$4  
Team Assets (bil): \$4.8**113. The McKenna Wealth****Management Group**  
**Morgan Stanley Wealth**  
Management  
Oakland, Calif.Key Advisors: Sean McKenna,  
Daniel Deitrick, Shams Deitrick  
▲ Typical Account (mil): \$5  
Team Assets (bil): \$4.1**114. The Lenox Group****Morgan Stanley Wealth**  
Management  
New YorkKey Advisors: Richard Priore Jr.,  
Frank De Flora, Michael Lysenko  
▲ Typical Account (mil): \$6  
Team Assets (bil): \$5.1**115. Maybach Partners****J.P. Morgan Wealth**  
Management  
New YorkKey Advisors: Jordan Mayer,  
Jennifer Mayer  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$10.2**116. Steinberg Forman Group****Morgan Stanley Private**  
Wealth Management  
New YorkKey Advisors: Evan Steinberg,  
Todd Forman  
▲ Typical Account (mil): \$25  
Team Assets (bil): \$6.7**117. The Legg Wealth****Management Group**  
**Morgan Stanley Private**  
Wealth Management  
Washington, D.C.Key Advisors: Jonathan Legg,  
Jeffrey Brill, Margaret Meagher  
■ Typical Account (mil): \$75  
Team Assets (bil): \$13.4**118. The Spiro Group****Morgan Stanley Wealth**  
Management  
New OrleansKey Advisors: James Spiro,  
David K. Butscher,  
Michael L. Gagliardi  
● Typical Account (mil): \$2  
Team Assets (bil): \$3.9**119. The Waldele Group****Merrill Wealth Management**  
New YorkKey Advisors: Robert Waldele,  
Jason E. Salgado, James T. Elliott  
▲ Typical Account (mil): \$35  
Team Assets (bil): \$6.9**120. The Schultz Group****UBS Wealth Management**  
PhoenixKey Advisors: Stockton Schultz,  
Steven Schultz, Justin Low  
▲ Typical Account (mil): \$10  
Team Assets (bil): \$3.2**121. The Wise Investor Group****Raymond James**  
Reston, Va.Key Advisors: Gregory Smith,  
Simon Hamilton,  
Chase Hinderstein  
● Typical Account (mil): \$2.5  
Team Assets (bil): \$3.9**122. The I Street Group****Morgan Stanley Wealth**  
Management  
Washington, D.C.Key Advisors: Brett Anthony,  
H.L. 'Trip' McLaughlin III,  
Matthew J. Offen  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$8.8**123. PWJ Wealth Management****UBS Wealth Management**  
New YorkKey Advisors: Eric Wagner,  
Ronald Giancristofaro,  
Arthur Randall  
● Typical Account (mil): \$4  
Team Assets (bil): \$5**124. Constellation Wealth****Management**  
**UBS Private Wealth**  
Management  
Hallandale Beach, Fla.Key Advisors: Nick Sadowsky,  
Worth Boyce, Missy Fierman  
▲ Typical Account (mil): \$25  
Team Assets (bil): \$8.5**125. The Braff Group****UBS Private Wealth**  
Management  
West Palm Beach, Fla.Key Advisors: Douglas Braff,  
Douglas Coughlin, Kelly Ganz  
▲ Typical Account (mil): \$5  
Team Assets (bil): \$14.7**126. The Preserve Group****Morgan Stanley Wealth**  
Management  
Jericho, N.Y.Key Advisors: Ira Mark,  
Jonathan Fladell,  
Michael Berger  
▲ Typical Account (mil): \$7.5  
Team Assets (bil): \$4.5**127. Thorndyke Wealth****Management Group**  
**Merrill Wealth Management**  
ChicagoKey Advisors: Mark Thorndyke,  
David J. Ponsot, Rees Mason  
● Typical Account (mil): \$3.5  
Team Assets (bil): \$4.2**128. The Opus Group****Morgan Stanley Private**  
Wealth Management  
San FranciscoKey Advisors: Grant Lee,  
William Breck, Alisa Sharp  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$9.8**129. The Atlanta Group****Morgan Stanley Wealth**  
Management  
AtlantaKey Advisors: Saul M. Levy,  
Steven Grosswald,  
Matthew Berman  
▲ Typical Account (mil): \$9  
Team Assets (bil): \$3.5**130. Orchard Wealth****Management**  
**Morgan Stanley Wealth**  
Management  
Lutherville, Md.Key Advisors: Dominic Nicolini,  
John Magiros, Mason Champion  
▲ Typical Account (mil): \$5  
Team Assets (bil): \$3.3**131. HLS Wealth Management****Morgan Stanley Wealth**  
Management  
New YorkKey Advisors: Evan Semegran,  
Nicole Drury, David Glickstein  
▲ Typical Account (mil): \$8  
Team Assets (bil): \$3.7**132. The 720 Wealth****Management Group**  
**Morgan Stanley Wealth**  
Management  
Westport, Conn.Key Advisors: Harold Trischman,  
Robert Franchini, Joyce Goldfarb  
▲ Typical Account (mil): \$8  
Team Assets (bil): \$4.4**133. The Harbor Group****Morgan Stanley Private**  
Wealth Management  
New YorkKey Advisors: Jeff DiNapoli,  
John Vessa, Corey Fleisher  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$7.4**134. The Maddalena Group****Morgan Stanley Wealth**  
Management  
Purchase, N.Y.Key Advisors: Tony Maddalena,  
Seth Marcus, Donald Levy  
▲ Typical Account (mil): \$5  
Team Assets (bil): \$3.6**135. ESW Group****Morgan Stanley Private**  
Wealth Management  
Los AngelesKey Advisors: Darren Edwards,  
Harry Suh, Justin Weiss  
▲ Typical Account (mil): \$40  
Team Assets (bil): \$4.2**136. FTB Financial Services****UBS Wealth Management**  
CincinnatiKey Advisors: Bill McCarthy,  
Tim Dumont, Kelly Wittich  
▲ Typical Account (mil): \$6.5  
Team Assets (bil): \$4.7**137. The Frame Catlett Rose****Group**  
**Morgan Stanley Private**  
Wealth Management  
New YorkKey Advisors: Thomas Frame,  
Thomas Catlett, Charles Rose  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$5.1**138. The Elwaw/Cavalieri****Group**  
**Morgan Stanley Wealth**  
Management  
MiamiKey Advisors: John Elwaw,  
Matias Cavalieri  
▲ Typical Account (mil): \$20  
Team Assets (bil): \$4.2**139. The Seminara Group****Morgan Stanley Private**  
Wealth Management  
Morristown, N.J.Key Advisors: Frank Seminara,  
Peter Seminara, Robert Knorr  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$3.2**140. The 1550 Group****Morgan Stanley Private**  
Wealth Management  
DenverKey Advisors: Jamie Henkel,  
Bruce DiBiase, Conor McCallin  
▲ Typical Account (mil): \$25  
Team Assets (bil): \$2.7**141. True North Partners****UBS Private Wealth**  
Management  
New YorkKey Advisors: Hank Ludwicki,  
Jason Latos, Scott MacDonald  
▲ Typical Account (mil): \$40  
Team Assets (bil): \$6.6**142. GreenBridge**William Blair  
ChicagoKey Advisors: John Cimaroli,  
Cam McKinney  
▲ Typical Account (mil): \$30  
Team Assets (bil): \$6.5**143. Loconiskar Pursel****Biddinger Nienberg Rochow**  
Private Wealth Management  
Merrill Private Wealth  
Management  
Bloomfield Hills, Mich.Key Advisors: Dana Loconiskar,  
Thomas Pursel,  
Matthew Biddinger  
▲ Typical Account (mil): \$25  
Team Assets (bil): \$4.9**144. The Northwest Compass****Group**  
**Morgan Stanley Wealth**  
Management  
SeattleKey Advisors: Brian Acarregui,  
Michael Healey, Brian Oliver  
▲ Typical Account (mil): \$5  
Team Assets (bil): \$4**145. RM Compass Group****Morgan Stanley Wealth**  
Management  
AtlantaKey Advisors: Graham Roberts,  
Jason Pace  
▲ Typical Account (mil): \$10  
Team Assets (bil): \$3.9**146. Greco Wealth****Management Group**  
**UBS Wealth Management**  
Hartford, Conn.Key Advisors: William Greco,  
Martin Kearns, Katelyn Greco  
▲ Typical Account (mil): \$5.5  
Team Assets (bil): \$7**147. Liberty Trail Wealth****Management**  
**UBS Wealth Management**  
Warren, N.J.Key Advisors: Jack Riley,  
Michael Jordao, Jesse Kent  
▲ Typical Account (mil): \$5  
Team Assets (bil): \$4.9**148. Excelsior Wealth****Management**  
**Morgan Stanley Private**  
Wealth Management  
New YorkKey Advisors: Craig Pastolove,  
Jesse Friedman, Scott Sklar  
▲ Typical Account (mil): \$25  
Team Assets (bil): \$5**149. de Groot & Associates****Merrill Wealth Management**  
The Woodlands, TexasKey Advisor: Frederick de Groot  
▲ Typical Account (mil): \$7  
Team Assets (bil): \$3.6**150. Cornerstone Group****Silicon Valley**  
**Morgan Stanley Private**  
Wealth Management  
Menlo Park, Calif.Key Advisors: Matthew Sheehan,  
Alex Oberle, Daniel Gieseke  
▲ Typical Account (mil): \$20  
Team Assets (bil): \$5.2**151. MBA Private Wealth****Merrill Private Wealth**  
Management  
Naples, Fla.Key Advisors: Michelle Mayer,  
Chelsea Botta, Paige Decker  
■ Typical Account (mil): \$50  
Team Assets (bil): \$3.9**152. The Mahoney Team****Morgan Stanley Private**  
Wealth Management  
Morristown, N.J.Key Advisor: Scott Mahoney  
▲ Typical Account (mil): \$20  
Team Assets (bil): \$2.2**153. Premier Wealth Partners****Ameriprise Financial**  
PittsburghKey Advisors: AJ Jugan,  
Antonio Aiello,  
Jeffery Suhayda  
● Typical Account (mil): \$1  
Team Assets (bil): \$7.8**154. Green Wealth****Management Group**  
Wells Fargo Advisors  
Financial Network  
Wayzata, Minn.Key Advisor: Randall Green  
● Typical Account (mil): \$2  
Team Assets (bil): \$3.8**155. SoundView Wealth****Management**  
**Morgan Stanley Wealth**  
Management  
Jericho, N.Y.Key Advisors: Frank Lourenso,  
Dan Griesmeyer, Mike Simon  
▲ Typical Account (mil): \$5  
Team Assets (bil): \$3.6**156. The Peterson Team****Neuberger Berman**  
New YorkKey Advisors: William Peterson,  
Laurie Davis, Kenneth Marino  
▲ Typical Account (mil): \$5.4  
Team Assets (bil): \$3.8**157. BV Group****UBS Private Wealth**  
Management  
Boca Raton, Fla.Key Advisors: Michael Bober,  
Ed Ventrice, Alex Santos  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$4.4**158. Legacy Multi-Family****Group**  
**UBS Private Wealth**  
Management  
Los AngelesKey Advisors: Patrick Schaffer,  
Ryan Bristol, Corey Mazza  
▲ Typical Account (mil): \$45  
Team Assets (bil): \$4.6**159. The CKWM Group****Merrill Private Wealth**  
Management  
ChicagoKey Advisors: Thomas Kane, F.  
Michael Covey, Jack Mullen  
▲ Typical Account (mil): \$40  
Team Assets (bil): \$10.7**160. 512 Wealth Partners****UBS Wealth Management**  
Austin, TexasKey Advisors: Mark Moore,  
Tim Oates, Jay Mechling  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$3.3**161. The Traum Vaughan Group****Morgan Stanley Private**  
Wealth Management  
Menlo Park, Calif.Key Advisors: Jeffrey Traum,  
Brannan Vaughan, Todd Gem

## BARRON'S SPECIAL REPORT

**182. Jacobson Kenny Team**  
Morgan Stanley Private Wealth Management  
St. Petersburg, Fla.  
Key Advisors: Marc Jacobson, Bryce Kenny, Brett Benson  
▲ Typical Account (mil): \$20  
Team Assets (bil): \$3.2

**183. The Abacus Group**  
Morgan Stanley Private Wealth Management  
New York  
Key Advisors: Shawn Rubin, Anthony Perna, Evan Malik  
▲ Typical Account (mil): \$10  
Team Assets (bil): \$3.5

**184. The Strachan Group**  
Morgan Stanley Private Wealth Management  
Boston  
Key Advisors: Brian Strachan, Connor Strachan, Keri Arone  
▲ Typical Account (mil): \$25  
Team Assets (bil): \$3.9

**185. The Shadden Group**  
Morgan Stanley Private Wealth Management  
Long Beach, Calif.  
Key Advisors: John Shadden, Mike Van Dyke, Gary Velek  
▲ Typical Account (mil): \$7.5  
Team Assets (bil): \$7.4

**186. The Meridian Wealth Management Group**  
Morgan Stanley Wealth Management  
Atlanta  
Key Advisors: Michael Wagner, Michael Spector, Charles Cartwright  
▲ Typical Account (mil): \$6.1  
Team Assets (bil): \$4.5

**187. The Fortis Wealth Management Group**  
Morgan Stanley Wealth Management  
Columbus, Ohio  
Key Advisors: Michael Beers, Peter Risch, Tony Penzone  
▲ Typical Account (mil): \$20  
Team Assets (bil): \$4.2

**188. The Swift Group**  
Merrill Wealth Management  
Wymissing, Pa.  
Key Advisors: John Minnich, Stephen Bealer  
● Typical Account (mil): \$3  
Team Assets (bil): \$4.4

**189. The Sean Yu Group**  
Morgan Stanley Private Wealth Management  
Pasadena, Calif.  
Key Advisors: Sean Yu, Davin Chen  
▲ Typical Account (mil): \$16  
Team Assets (bil): \$2.5

**190. The McCauley McGuirk Group**  
Merrill Private Wealth Management  
Boston  
Key Advisors: Paul McCauley, Gary McGuirk  
▲ Typical Account (mil): \$49.5  
Team Assets (bil): \$3.8

**191. Sage Wealth Management**  
Morgan Stanley Private Wealth Management  
Boca Raton, Fla.  
Key Advisors: David Berdon, Russell Ganz, Ryan Willsen  
▲ Typical Account (mil): \$20  
Team Assets (bil): \$4.8

**192. The Snyder/Balducci Group**  
Merrill Wealth Management  
New York  
Key Advisors: Charles Balducci, Eric Snyder  
▲ Typical Account (mil): \$14  
Team Assets (bil): \$4.9

**193. OakRing Wealth Partners**  
UBS Wealth Management  
Chattanooga, Tenn.

Key Advisors: David Saltzman, Kevin King, Kevin Haynes  
▲ Typical Account (mil): \$5  
Team Assets (bil): \$2.9

**194. The SiRiCa Wealth Management Group**  
Merrill Wealth Management  
Clifton Park, N.Y.  
Key Advisors: Todd Silaika, Michael O'Toole, Erick Richardson  
● Typical Account (mil): \$3.5  
Team Assets (bil): \$3.8

**195. The Sullivan Group**  
Merrill Wealth Management  
Garden City, N.Y.  
Key Advisors: Thomas E. Sullivan, Charles M. Carson, Thomas P. Sullivan  
● Typical Account (mil): \$3  
Team Assets (bil): \$3.7

**196. Dunn Scott Jenkins Group**  
Merrill Wealth Management  
Walnut Creek, Calif.  
Key Advisors: Michael Dunn, Jeff Jenkins, Brianna Dunn  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$3.2

**197. The MCNW Group**  
Merrill Wealth Management  
Seattle  
Key Advisors: Matthew Van Beek, Chris Jay  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$4.3

**198. The Barnes Chung Lally Group**  
J.P. Morgan Wealth Management  
Los Angeles  
Key Advisors: John Barnes, Sanah Chung, Joseph Lally  
▲ Typical Account (mil): \$25  
Team Assets (bil): \$2.6

**199. The Mountain View Group**  
Morgan Stanley Wealth Management  
Mountain View, Calif.  
Key Advisors: Jack Wong, Darryl Ng, David Knudsen  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$2.5

**200. The Halbfinger Group**  
UBS Wealth Management  
New York  
Key Advisors: Douglas Summer, Adam Lafer, Natalya Glushakova  
▲ Typical Account (mil): \$20  
Team Assets (bil): \$4.1

**201. May Malfettone Gold Biblo Group**  
Merrill Wealth Management  
Garden City, N.Y.  
Key Advisors: W. Corby May, Matthew Gold, Brian Malfettone  
▲ Typical Account (mil): \$5  
Team Assets (bil): \$2.9

**202. Ferguson-Smith-Cohen Group**  
Morgan Stanley Wealth Management  
Leewood, Kan.  
Key Advisors: Scott Ferguson, Dianna Smith, Patrick Cohen  
▲ Typical Account (mil): \$7.3  
Team Assets (bil): \$2.9

**203. The Magrone Group**  
Merrill Private Wealth Management  
New York  
Key Advisor: David Magrone  
■ Typical Account (mil): \$75  
Team Assets (bil): \$7.7

**204. Pfaff, Bailey, McCannon & Fuelleman Group**  
UBS Private Wealth Management  
Chicago  
Key Advisors: Michael Bailey, Adam Fuelleman, Christopher Pfaff  
▲ Typical Account (mil): \$30  
Team Assets (bil): \$3.1

**205. The Oaks Group**  
Morgan Stanley Wealth Management  
Westlake Village, Calif.  
Key Advisors: Seth Haye, Duncan Hizzey, Katie DuBois  
▲ Typical Account (mil): \$10  
Team Assets (bil): \$3

**206. Continuity Group**  
Wells Fargo Advisors  
Financial Network  
Springfield, Ore.  
Key Advisors: Jerry Rouleau, Justin Buell, Dominic Corleto  
● Typical Account (mil): \$2  
Team Assets (bil): \$5.5

**207. The Malkin Group**  
Morgan Stanley Private Wealth Management  
New York  
Key Advisors: Joshua Malkin, Dan Bello, Michael Kane  
▲ Typical Account (mil): \$25  
Team Assets (bil): \$4.7

**208. Banner Group**  
Morgan Stanley Wealth Management  
Newtown Square, Pa.  
Key Advisors: Justin Wellen, Patrick Donnelly, Brett Wallace  
● Typical Account (mil): \$2  
Team Assets (bil): \$3

**209. The Bhatia Group**  
Merrill Private Wealth Management  
Chicago  
Key Advisors: Raj Bhatia, Ariana Bhatia  
▲ Typical Account (mil): \$20  
Team Assets (bil): \$3.2

**210. Lerner Winderbaum**  
Morgan Stanley Private Wealth Management  
New York  
Key Advisors: Anna Winderbaum, Joseph Lerner  
■ Typical Account (mil): \$50  
Team Assets (bil): \$3.8

**211. Young Lockwood Sauer Wealth Management**  
UBS Private Wealth Management  
Houston  
Key Advisors: Brian Sauer, Barry Young  
▲ Typical Account (mil): \$20  
Team Assets (bil): \$4.6

**212. Beekman BreakWater Partners**  
UBS Wealth Management  
New York  
Key Advisors: Ken Gunsberger, Michael Rhodes, Ryan Kneipper  
▲ Typical Account (mil): \$5  
Team Assets (bil): \$3.3

**213. Double Oak Wealth Management Group**  
Morgan Stanley Wealth Management  
Birmingham, Ala.  
Key Advisors: William Hiden, Stuart Patton, Hollis N. Gieger  
● Typical Account (mil): \$2.8  
Team Assets (bil): \$3.2

**214. Moriarity DeHond Mulka & Scherer**  
Morgan Stanley Private Wealth Management  
Chicago  
Key Advisors: James Moriarity, Brad DeHond, Emily Mulka  
■ Typical Account (mil): \$75  
Team Assets (bil): \$4.8

**215. Skyline Wealth Management Group**  
Morgan Stanley Wealth Management  
San Jose, Calif.  
Key Advisors: Emilio de Sousa, Allan Walsworth, Jason Moyers  
▲ Typical Account (mil): \$7  
Team Assets (bil): \$3.7

**216. The Meyers Group**  
J.P. Morgan Wealth Management  
San Francisco  
Key Advisors: Elaine Meyers, Anna Ochoa, Alex Meyers  
▲ Typical Account (mil): \$45  
Team Assets (bil): \$7.4

**217. The Arthurs Malof Group**  
UBS Wealth Management  
Buffalo, N.Y.  
Key Advisors: Glenn Arthurs, Christopher Malof, Wyatt Arthurs  
● Typical Account (mil): \$4  
Team Assets (bil): \$4.2

**218. Maltby/Ludington**  
UBS Private Wealth Management  
Chicago  
Key Advisors: Jay Maltby, Matt Ludington  
▲ Typical Account (mil): \$20  
Team Assets (bil): \$4.6

**219. Contigo Wealth Management Group**  
Morgan Stanley Wealth Management  
Colorado Springs, Colo.  
Key Advisors: David Surofchek, Jason Chao, Scott Martin  
● Typical Account (mil): \$3  
Team Assets (bil): \$3.6

**220. The Cename Team**  
Merrill Private Wealth Management  
Columbus, Ohio  
Key Advisors: Peter Motta, Charles Jarrett, Larry Manierre  
▲ Typical Account (mil): \$20  
Team Assets (bil): \$8.5

**221. Kahner Segal Partners**  
UBS Private Wealth Management  
New York  
Key Advisors: Andrew Howard Kahner, Benjamin Segal  
▲ Typical Account (mil): \$10  
Team Assets (bil): \$2.2

**222. HLM Capital Management Group**  
Wells Fargo Advisors  
Financial Network  
Highland Park, Ill.  
Key Advisors: Benjamin Leshem, Steven Hefter, Charles Margolis  
▲ Typical Account (mil): \$16  
Team Assets (bil): \$3.3

**223. Team 182**  
Morgan Stanley Private Wealth Management  
San Francisco  
Key Advisors: Michael Appleton, James Schlueter, Scott Lamson  
■ Typical Account (mil): \$75  
Team Assets (bil): \$10

**224. Executive Wealth Partners**  
UBS Private Wealth Management  
Cincinnati  
Key Advisors: Casey Marsh, Stephen Fish, Austin Poston  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$3.5

**225. The Kugel Briegs Group**  
Merrill Wealth Management  
Bridgewater, N.J.  
Key Advisor: David Briegs  
● Typical Account (mil): \$4  
Team Assets (bil): \$3.1

**226. The Matthews Group**  
UBS Private Wealth Management  
Bellevue, Wash.  
Key Advisors: Michael Matthews, Tyler Matthews, Melanie Matthews  
▲ Typical Account (mil): \$20  
Team Assets (bil): \$3.4

**227. Jones/Dounias**  
Morgan Stanley Private Wealth Management  
Menlo Park, Calif.  
Key Advisors: Emmanuel Dounias, Anthony Jones  
▲ Typical Account (mil): \$40  
Team Assets (bil): \$10.7

**228. The Alta Group**  
J.P. Morgan Wealth Management  
San Francisco  
Key Advisors: Devon Porpora, Doug Feliciano, Tom Egan  
▲ Typical Account (mil): \$5  
Team Assets (bil): \$2.9

**229. The Burbank Group**  
Morgan Stanley Private Wealth Management  
San Francisco  
Key Advisors: Mike Burbank, Scott Hafeli, Willis Davis  
▲ Typical Account (mil): \$45  
Team Assets (bil): \$4.7

**230. The Oliver Private Wealth Management Group**  
Wells Fargo Advisors  
Charlotte, N.C.  
Key Advisors: William Oliver, Thomas McRae, Thomas McCormick  
▲ Typical Account (mil): \$10  
Team Assets (bil): \$4.1

**231. Johansen Petrauskas & Associates**  
Merrill Wealth Management  
The Woodlands, Texas  
Key Advisors: Charles Johansen, Brian Petrauskas, Jonathan Zodin  
▲ Typical Account (mil): \$7  
Team Assets (bil): \$3.5

**232. Soteria Wealth Management**  
UBS Private Wealth Management  
Paramus, N.J.  
Key Advisors: Nicholas Pepe, Michael James, Joseph Vogler  
▲ Typical Account (mil): \$20  
Team Assets (bil): \$4.3

**233. River Prairie Wealth Partners**  
Ameriprise Financial  
Altoona, Wis.  
Key Advisors: Adam Mohr, Christopher Kolinski, Kathryn Noe  
● Typical Account (mil): \$1.1  
Team Assets (bil): \$3.3

**234. The Mathias Group**  
Morgan Stanley Wealth Management  
Chicago  
Key Advisors: Trevor Mathias, Pat Ryan, Adam Coons  
▲ Typical Account (mil): \$5  
Team Assets (bil): \$2.3

**235. The Visionary Wealth Management Team**  
RBC Wealth Management  
Green Bay, Wis.  
Key Advisors: Mike Busick, Richard Vezina, David Tikens  
● Typical Account (mil): \$2.5  
Team Assets (bil): \$2.6

**236. The Hamilton Retirement Planning Group**  
Morgan Stanley Wealth Management  
Kansas City, Mo.  
Key Advisors: Christopher Briley, Thomas Riordan, Gordon Hamilton  
● Typical Account (mil): \$0.2  
Team Assets (bil): \$2.3

**237. The Radius Group**  
UBS Wealth Management  
Miamisburg, Ohio  
Key Advisors: Blair T. Cornell, Tiffany D. Kellner, John W. Reagan Jr.  
● Typical Account (mil): \$3  
Team Assets (bil): \$2.3

**238. The ECAB Investment Group**  
Baird  
Milwaukee  
Key Advisors: Andrew Epstein, Chris Calvelli, David Epstein  
▲ Typical Account (mil): \$10  
Team Assets (bil): \$6.2

**239. Labyrinth Wealth Advisors**  
UBS Private Wealth Management  
San Francisco  
Key Advisors: Chris Clifford, Kate Kennedy, Andrew Baumgartner  
▲ Typical Account (mil): \$25  
Team Assets (bil): \$4.2

**240. The Fifth Avenue Group**  
Morgan Stanley Private Wealth Management  
New York  
Key Advisor: Frank Delli Carpini  
▲ Typical Account (mil): \$19  
Team Assets (bil): \$2.7

**241. The BG Group**  
UBS Wealth Management  
New York  
Key Advisors: Michael Bromberg, Daniel Gerschel, Robert Mancino  
▲ Typical Account (mil): \$5  
Team Assets (bil): \$3

**242. Tramontano & Associates**  
Merrill Wealth Management  
San Antonio, Texas  
Key Advisors: Brian Tramontano, Jacob Flach, Nicholas Tramontano  
● Typical Account (mil): \$3  
Team Assets (bil): \$1.9

**243. Polaris Wealth Management**  
UBS Private Wealth Management  
Greenwich, Conn.  
Key Advisors: Derek Thompson, Michele McCallion, Michael Henderson  
▲ Typical Account (mil): \$20  
Team Assets (bil): \$4.5

**244. The Fries Wealth Management Group**  
Merrill Wealth Management  
Chicago  
Key Advisors: Daniel Fries, William Gomolinski, Robert O'Neill  
● Typical Account (mil): \$2  
Team Assets (bil): \$2.5

**245. The Madison Group**  
Morgan Stanley Wealth Management  
Louisville, Ky.  
Key Advisors: Philip McCauley II, Paul McCauley, K. Douglas Kraft Jr.  
▲ Typical Account (mil): \$5  
Team Assets (bil): \$2.5

**246. BG Wealth Partners**  
Citizens Private Wealth  
San Francisco  
Key Advisors: Rick Gordon, Hugh Beecher, Drew Curto  
▲ Typical Account (mil): \$15  
Team Assets (bil): \$4

**247. The Evergreen 21 Group**  
Morgan Stanley Private Wealth Management  
New York  
Key Advisors: Rod Aronson, David Stella, Rodman Tilt  
▲ Typical Account (mil): \$40  
Team Assets (bil): \$4.1

**248. The Thisted Group**  
Merrill Private Wealth Management  
Denver  
Key Advisors: Mitch Hoover, Will Bradford  
▲ Typical Account (mil): \$25  
Team Assets (bil): \$3.8

**249. The La Jolla Cove Group**  
Morgan Stanley Private Wealth Management  
La Jolla, Calif.  
Key Advisors: Joseph Castagnola, William Bonelli, Nicholas Moore  
■ Typical Account (mil): \$50  
Team Assets (bil): \$7.1

**250. The Beckwith Group**  
Merrill Wealth Management  
Chicago  
Key Advisors: Jason Beckwith, Sam Coverdale, Alexander Beckwith  
▲ Typical Account (mil): \$5  
Team Assets (bil): \$3

## TOP 250 PRIVATE WEALTH MANAGEMENT TEAMS 2026

## How a Sports-Minded Approach Helps UBS Advisors Serve Their Clients

Members of the Legacy Multi-Family Group at UBS in Los Angeles say that putting clients first, then the team, then themselves, helps prioritize goals and objectives.

BY CHERYL WINOKUR MUNK

The Legacy Multi-Family Group at UBS Private Wealth Management in Los Angeles functions a lot like a sports team. Its winning approach combines individual strengths with a shared goal of providing comprehensive wealth management services to clients.

“We all share the same set of values, including a client-first mentality, doing the right thing when no one is looking, making our clients’ lives easier, and constantly striving for excellence,” says Patrick Schaffer, the team’s investment specialist, who is also an adjunct faculty member at Villanova University. He co-heads the team with Ryan Bristol, an outdoor-sports enthusiast who has a background in investment banking,

From left, Ryan Bristol, Corey Mazza, and Patrick Schaffer of UBS Private Wealth Management’s Legacy Multi-Family Group, Los Angeles.



PHOTOGRAPH BY STELLA KALININA