

June 11, 2018

# BARRON'S



## The Top 100 Women Financial Advisors

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Our No. 1 Advisor:  
Karen McDonald of  
Morgan Stanley

# The Top 100 Women Advisors

Here are America's top women financial advisors, as identified by *Barron's*. The ranking reflects the volume of assets overseen by the advisors and their teams, revenues generated for the firms, and the quality of the advisors' practices. The scoring system assigns a top score of 100 and rates the rest by comparing them with the top-ranked advisor. A ranking of "N" indicates the advisor was not ranked in the specified year. HNW=high net worth; UHNW=ultra-high net worth.

## 1. Karen McDonald

*Morgan Stanley WM, Palo Alto*  
**2017 Rank:** 1  
**Client Types:** Retail, HNW, UHNW, Institutional  
**Team Total Assets** (mil): \$58,797  
**Typical Acct Size** (mil): \$3  
**Typical Net Worth** (mil): \$10

## 2. Kimberlee Orth

*Ameriprise Financial, Wilmington*  
**2017 Rank:** 3  
**Client Types:** Retail, HNW, UHNW, Institutional  
**Team Total Assets** (mil): \$2,378  
**Typical Acct Size** (mil): \$5.16  
**Typical Net Worth** (mil): \$13.04

## 3. Valerie Newell

*Mariner Wealth Advisors-Cincinnati Cincinnati*  
**2017 Rank:** 4  
**Client Types:** Retail, HNW, UHNW  
**Team Total Assets** (mil): \$2,841  
**Typical Acct Size** (mil): \$3.4  
**Typical Net Worth** (mil): \$7.5

## 4. Stephanie Stiefel

*Neuberger Berman New York*  
**2017 Rank:** 5  
**Client Types:** HNW, UHNW, Institutional  
**Team Total Assets** (mil): \$2,136  
**Typical Acct Size** (mil): \$15  
**Typical Net Worth** (mil): \$45

## 5. Lori Van Dusen

*LVW Advisors, Pittsford, N.Y.*  
**2017 Rank:** N  
**Client Types:** HNW, UHNW, Foundations, Endowments, Institutional  
**Team Total Assets** (mil): \$4,700  
**Typical Acct Size** (mil): \$18  
**Typical Net Worth** (mil): \$35

## 6. Shannon Eusey

*Beacon Pointe Advisors Newport Beach, Calif.*  
**2017 Rank:** 6  
**Client Types:** Retail, HNW, UHNW, Foundations, Endowments  
**Team Total Assets** (mil): \$5,918  
**Typical Acct Size** (mil): \$5  
**Typical Net Worth** (mil): \$15

## 7. Susan Kaplan

*Kaplan Financial Svcs, Newton, Mass.*  
**2017 Rank:** 7  
**Client Types:** HNW, UHNW  
**Team Total Assets** (mil): \$1,862  
**Typical Acct Size** (mil): \$3.5  
**Typical Net Worth** (mil): \$11

## 8. Elaine Meyers

*J.P. Morgan Securities, San Francisco*  
**2017 Rank:** 21  
**Client Types:** HNW, UHNW  
**Team Total Assets** (mil): \$2,800  
**Typical Acct Size** (mil): \$50  
**Typical Net Worth** (mil): \$300

## 9. Valerie Houts

*Merrill Lynch WM, San Francisco*  
**2017 Rank:** 15  
**Client Types:** HNW, UHNW, Institutional  
**Team Total Assets** (mil): \$22,080  
**Typical Acct Size** (mil): \$50  
**Typical Net Worth** (mil): \$750

## 10. Holly Newman Kroft

*Neuberger Berman, New York*  
**2017 Rank:** 9  
**Client Types:** HNW, UHNW, Foundations, Endowments  
**Team Total Assets** (mil): \$1,700  
**Typical Acct Size** (mil): \$8  
**Typical Net Worth** (mil): \$15

## 11. Sonia Attkiss

*UBS Financial Svcs, New York*  
**2017 Rank:** 22  
**Client Types:** HNW, UHNW  
**Team Total Assets** (mil): \$8,270  
**Typical Acct Size** (mil): \$30  
**Typical Net Worth** (mil): \$50

## 12. Dagny Maidman

*First Republic Investment Mgmt San Francisco*  
**2017 Rank:** 16  
**Client Types:** HNW, UHNW  
**Team Total Assets** (mil): \$1,950  
**Typical Acct Size** (mil): \$50  
**Typical Net Worth** (mil): \$75

## 13. Deborah Montaperto

*Morgan Stanley PWM, New York*  
**2017 Rank:** 8  
**Client Types:** HNW, UHNW, Foundations  
**Team Total Assets** (mil): \$14,118  
**Typical Acct Size** (mil): \$50  
**Typical Net Worth** (mil): \$100

## 14. Laila Pence

*Pence WM, Newport Beach, Calif.*  
**2017 Rank:** 10  
**Client Types:** Retail, HNW, UHNW  
**Team Total Assets** (mil): \$1,554  
**Typical Acct Size** (mil): \$2  
**Typical Net Worth** (mil): \$5

## 15. Virginia Guy

*Neuberger Berman, New York*  
**2017 Rank:** 13  
**Client Types:** HNW, UHNW  
**Team Total Assets** (mil): \$1,204  
**Typical Acct Size** (mil): \$5  
**Typical Net Worth** (mil): \$15

## 16. Mary Deatherage

*Morgan Stanley PWM, Little Falls, N.J.*  
**2017 Rank:** 11  
**Client Types:** HNW, UHNW, Foundations, Institutional  
**Team Total Assets** (mil): \$2,600  
**Typical Acct Size** (mil): \$10  
**Typical Net Worth** (mil): \$25

## 17. Shawn Parker

*Ameriprise Financial, Schaumburg, Ill.*  
**2017 Rank:** 14  
**Client Types:** Retail, HNW, UHNW, Institutional  
**Team Total Assets** (mil): \$2,200  
**Typical Acct Size** (mil): \$2.5  
**Typical Net Worth** (mil): \$5

## 18. Maureen Raihle

*Merrill Lynch PBIG, Chicago*  
**2017 Rank:** 18  
**Client Types:** HNW, UHNW  
**Team Total Assets** (mil): \$1,660  
**Typical Acct Size** (mil): \$20  
**Typical Net Worth** (mil): \$50

## 19. Anna Winderbaum

*Morgan Stanley PWM New York*  
**2017 Rank:** 23  
**Client Types:** HNW, UHNW  
**Team Total Assets** (mil): \$2,258  
**Typical Acct Size** (mil): \$25  
**Typical Net Worth** (mil): \$45

## 20. Alexandra Furhmann

*CIBC Atlantic Trust PWM, New York*  
**2017 Rank:** N  
**Client Types:** HNW, UHNW, Foundations, Institutional  
**Team Total Assets** (mil): \$1,332  
**Typical Acct Size** (mil): \$11  
**Typical Net Worth** (mil): \$20

## 21. Cheryl Young

*Morgan Stanley WM, Los Gatos, Calif.*  
**2017 Rank:** 39  
**Client Types:** Retail, HNW, UHNW  
**Team Total Assets** (mil): \$1,508  
**Typical Acct Size** (mil): \$5  
**Typical Net Worth** (mil): \$15

## 22. Gillian Yu

*Morgan Stanley PWM, San Francisco*  
**2017 Rank:** 25  
**Client Types:** UHNW  
**Team Total Assets** (mil): \$4,203  
**Typical Acct Size** (mil): \$50  
**Typical Net Worth** (mil): \$100

## 23. Inna Kelly

*Morgan Stanley WM, San Francisco*  
**2017 Rank:** 43  
**Client Types:** HNW, UHNW, Institutional  
**Team Total Assets** (mil): \$1,303  
**Typical Acct Size** (mil): \$20  
**Typical Net Worth** (mil): \$30

## 24. Gail Reid

*Ameriprise Financial, Glendale, Calif.*  
**2017 Rank:** 60  
**Client Types:** Retail, HNW, Foundations  
**Team Total Assets** (mil): \$1,449  
**Typical Acct Size** (mil): \$2.5  
**Typical Net Worth** (mil): \$4

## 25. Louise Lane

*William Blair & Co., Chicago*  
**2017 Rank:** 83  
**Client Types:** Retail, HNW, UHNW, Foundations  
**Team Total Assets** (mil): \$1,069  
**Typical Acct Size** (mil): \$2  
**Typical Net Worth** (mil): \$6

## 26. Sharon Oberlander

*Merrill Lynch WM, Chicago*  
**2017 Rank:** 24  
**Client Types:** HNW, UHNW  
**Team Total Assets** (mil): \$1,175  
**Typical Acct Size** (mil): \$5.7  
**Typical Net Worth** (mil): \$12

## 27. Jeanie Wyatt

*South Texas Money Mgmt San Antonio*  
**2017 Rank:** 27  
**Client Types:** Retail, HNW, UHNW, Foundations  
**Team Total Assets** (mil): \$3,372  
**Typical Acct Size** (mil): \$1.07  
**Typical Net Worth** (mil): \$7.43

## 28. Geri Pell

*Ameriprise Financial, Rye Brook, N.Y.*  
**2017 Rank:** 32  
**Client Types:** Retail, HNW, UHNW, Foundations  
**Team Total Assets** (mil): \$1,355  
**Typical Acct Size** (mil): \$2.27  
**Typical Net Worth** (mil): \$5.1

## 29. Debbie Jorgensen

*Merrill Lynch WM, San Francisco*  
**2017 Rank:** 30  
**Client Types:** HNW, UHNW, Foundations, Endowments  
**Team Total Assets** (mil): \$1,565  
**Typical Acct Size** (mil): \$30  
**Typical Net Worth** (mil): \$65

## 30. Mary Mullin

*Merrill Lynch WM, Boston*  
**2017 Rank:** 31  
**Client Types:** HNW, UHNW  
**Team Total Assets** (mil): \$1,896  
**Typical Acct Size** (mil): \$5  
**Typical Net Worth** (mil): \$12

## 31. Emily Rubin

*UBS Financial Svcs, New York*  
**2017 Rank:** 29  
**Client Types:** HNW, UHNW  
**Team Total Assets** (mil): \$1,330  
**Typical Acct Size** (mil): \$10  
**Typical Net Worth** (mil): \$15

## 32. Deb Wetherby

*Wetherby Asset Mgmt, San Francisco*  
**2017 Rank:** 19  
**Client Types:** HNW, UHNW  
**Team Total Assets** (mil): \$4,870  
**Typical Acct Size** (mil): \$25.57  
**Typical Net Worth** (mil): \$40

## 33. Patti Brennan

*Key Financial, West Chester, Pa.*  
**2017 Rank:** 46  
**Client Types:** Retail, HNW, UHNW  
**Team Total Assets** (mil): \$915  
**Typical Acct Size** (mil): \$1  
**Typical Net Worth** (mil): \$2.5

## 34. Linda Stephans

*Morgan Stanley Graystone, Chicago*  
**2017 Rank:** 35  
**Client Types:** HNW, UHNW, Foundations, Endowments  
**Team Total Assets** (mil): \$7,505  
**Typical Acct Size** (mil): \$150  
**Typical Net Worth** (mil): \$100

**35. Kristina Van Liew***Morgan Stanley Graystone, Chicago***2017 Rank:** 34**Client Types:** HNWX, UHNW, Foundations, Endowments**Team Total Assets (mil):** \$7,505**Typical Acct Size (mil):** \$150**Typical Net Worth (mil):** \$100**36. Deborah Howard***Merrill Lynch WM, Atlanta***2017 Rank:** 37**Client Types:** Retail, HNWX, UHNW, Foundations, Endowments, Institutional**Team Total Assets (mil):** \$77,775**Typical Acct Size (mil):** \$5,170**Typical Net Worth (mil):** \$8,000**37. Margaret Starner***Raymond James, Coral Gables, Fla.***2017 Rank:** 26**Client Types:** Retail, HNWX, UHNW**Team Total Assets (mil):** \$1,055**Typical Acct Size (mil):** \$5**Typical Net Worth (mil):** \$7**38. Christiane Olsen***UBS Financial Svcs, New York***2017 Rank:** 94**Client Types:** Retail, HNWX, UHNW**Team Total Assets (mil):** \$4,843**Typical Acct Size (mil):** \$7**Typical Net Worth (mil):** \$12**39. Lisa Reed***Neuberger Berman Advisers, Los Angeles***2017 Rank:** N**Client Types:** HNWX, UHNW**Team Total Assets (mil):** \$810**Typical Acct Size (mil):** \$7**Typical Net Worth (mil):** \$10**40. Louise Gunderson***UBS Financial Svcs, New York***2017 Rank:** 38**Client Types:** Retail, HNWX, UHNW**Team Total Assets (mil):** \$825**Typical Acct Size (mil):** \$4.5**Typical Net Worth (mil):** \$12.5**41. Emily Van Hoorickx***UBS Financial Svcs, San Jose, Calif.***2017 Rank:** 40**Client Types:** Retail, HNWX, UHNW**Team Total Assets (mil):** \$6,254**Typical Acct Size (mil):** \$2**Typical Net Worth (mil):** \$10**42. Debra Brede***D.K. Brede Investment Mgmt Needham, Mass.***2017 Rank:** 45**Client Types:** Retail, HNWX, UHNW, Institutional**Team Total Assets (mil):** \$895**Typical Acct Size (mil):** \$2**Typical Net Worth (mil):** \$3.5**43. Susan Kingsolver***Morgan Stanley PWM, New York***2017 Rank:** 47**Client Types:** Retail, HNWX, UHNW**Team Total Assets (mil):** \$1,120**Typical Acct Size (mil):** \$20**Typical Net Worth (mil):** \$75**44. Jacqueline Willens***UBS Financial Svcs, New York***2017 Rank:** 36**Client Types:** Retail, HNWX, UHNW**Team Total Assets (mil):** \$893**Typical Acct Size (mil):** \$5**Typical Net Worth (mil):** \$10**45. Christina Boyd***Merrill Lynch WM, Wayzata, Minn.***2017 Rank:** 33**Client Types:** Retail, HNWX, UHNW, Institutional**Team Total Assets (mil):** \$1,214**Typical Acct Size (mil):** \$6**Typical Net Worth (mil):** \$15**46. Shari Burns***United Capital Seattle, Seattle***2017 Rank:** 41**Client Types:** HNWX, UHNW, Foundations**Team Total Assets (mil):** \$1,850**Typical Acct Size (mil):** \$6.47**Typical Net Worth (mil):** \$8.8**47. Dee Ann Schedler***CIBC Atlantic Trust PWM**Washington, D.C.***2017 Rank:** N**Client Types:** HNWX, UHNW, Institutional**Team Total Assets (mil):** \$1,968**Typical Acct Size (mil):** \$10**Typical Net Worth (mil):** \$12**48. Elizabeth Weikes***J.P. Morgan Securities, New York***2017 Rank:** N**Client Types:** Retail, HNWX, UHNW**Team Total Assets (mil):** \$2,380**Typical Acct Size (mil):** \$10**Typical Net Worth (mil):** \$25**49. Alyssa Moeder***Merrill Lynch PBIG, New York***2017 Rank:** 51**Client Types:** HNWX, UHNW, Endowments**Team Total Assets (mil):** \$6,008**Typical Acct Size (mil):** \$25**Typical Net Worth (mil):** \$100**50. Renee Fourcade***UBS Financial Svcs, Los Angeles***2017 Rank:** 77**Client Types:** Retail, HNWX, UHNW, Institutional**Team Total Assets (mil):** \$4,096**Typical Acct Size (mil):** \$10**Typical Net Worth (mil):** \$5**51. Tracey Gluck***J.P. Morgan Securities, Los Angeles***2017 Rank:** 71**Client Types:** HNWX, UHNW, Foundations**Team Total Assets (mil):** \$985**Typical Acct Size (mil):** \$10**Typical Net Worth (mil):** \$25**52. Kimberly Dwyer***CIBC Atlantic Trust PWM, Boston***2017 Rank:** N**Client Types:** HNWX, UHNW, Institutional**Team Total Assets (mil):** \$7,449**Typical Acct Size (mil):** \$17**Typical Net Worth (mil):** \$50**53. Charla McIntyre Fields***Ameriprise Financial, Hurst, Texas***2017 Rank:** 76**Client Types:** Retail, HNWX, UHNW**Team Total Assets (mil):** \$1,306**Typical Acct Size (mil):** \$1.5**Typical Net Worth (mil):** \$4**54. Kathleen Roeser***Morgan Stanley WM, Chicago***2017 Rank:** 42**Client Types:** HNWX, UHNW, Foundations, Institutional**Team Total Assets (mil):** \$1,087**Typical Acct Size (mil):** \$8**Typical Net Worth (mil):** \$15**55. Jennifer Marcontell***Edward Jones, Baytown, Texas***2017 Rank:** 73**Client Types:** Retail, HNWX**Team Total Assets (mil):** \$1,052**Typical Acct Size (mil):** \$2.05**Typical Net Worth (mil):** \$3.06**56. Trudy Haussmann***Securities America, Lake Forest, Calif.***2017 Rank:** 50**Client Types:** Retail, HNWX**Team Total Assets (mil):** \$1,081**Typical Acct Size (mil):** \$0.7**Typical Net Worth (mil):** \$1.5**57. Cheryl Holland***Abacus Planning Group**Columbia, S.C.***2017 Rank:** 52**Client Types:** HNWX, UHNW**Team Total Assets (mil):** \$1,056**Typical Acct Size (mil):** \$4.57**Typical Net Worth (mil):** \$8.92**58. Lisa Detanna***Raymond James, Beverly Hills, Calif.***2017 Rank:** 80**Client Types:** Retail, HNWX, UHNW, Foundations, Institutional**Team Total Assets (mil):** \$2,937**Typical Acct Size (mil):** \$5**Typical Net Worth (mil):** \$7**59. Teresa Jacobsen***UBS Financial Svcs, Stamford, Conn.***2017 Rank:** 67**Client Types:** HNWX, UHNW, Foundations, Endowments, Institutional**Team Total Assets (mil):** \$853**Typical Acct Size (mil):** \$11.5**Typical Net Worth (mil):** \$20**60. Linnell Sullivan***Merrill Lynch WM, Cincinnati***2017 Rank:** 57**Client Types:** HNWX, UHNW**Team Total Assets (mil):** \$1,035**Typical Acct Size (mil):** \$5**Typical Net Worth (mil):** \$10**61. Leslie Lauer***UBS Financial Svcs, Atlanta***2017 Rank:** 78**Client Types:** HNWX, UHNW, Institutional**Team Total Assets (mil):** \$2,975**Typical Acct Size (mil):** \$22**Typical Net Worth (mil):** \$40**62. Diane Compardo***Moneta Group, Clayton, Mo.***2017 Rank:** 65**Client Types:** HNWX, UHNW**Team Total Assets (mil):** \$1,091**Typical Acct Size (mil):** \$12**Typical Net Worth (mil):** \$17**63. Ann Marie Etergino***RBC WM, Chevy Chase, Md.***2017 Rank:** 62**Client Types:** Retail, HNWX, UHNW, Foundations, Endowments, Institutional**Team Total Assets (mil):** \$1,099**Typical Acct Size (mil):** \$7**Typical Net Worth (mil):** \$15

**THE MORE YOU KNOW,  
THE MORE WE MAKE SENSE.**

**64. Faith Xenos**

*Singer Xenos Schechter Sosler WM  
Coral Gables, Fla.*

**2017 Rank:** 54

**Client Types:** Retail, HNW, UHNW,  
Foundations, Endowments

**Team Total Assets (mil):** \$1,520

**Typical Acct Size (mil):** \$3

**Typical Net Worth (mil):** \$8.5

**65. Robin Reich**

*Merrill Lynch WM, New York*

**2017 Rank:** 56

**Client Types:** Retail, HNW, UHNW

**Team Total Assets (mil):** \$1,295

**Typical Acct Size (mil):** \$2.5

**Typical Net Worth (mil):** \$10

**66. Soo Kim**

*Ameriprise Financial, Vienna, Va.*

**2017 Rank:** 53

**Client Types:** Retail, HNW

**Team Total Assets (mil):** \$1,323

**Typical Acct Size (mil):** \$1

**Typical Net Worth (mil):** \$2

**67. Barbara Bruser**

*First Republic Investment Mgmt  
Los Angeles*

**2017 Rank:** 28

**Client Types:** HNW, UHNW

**Team Total Assets (mil):** \$977

**Typical Acct Size (mil):** \$2

**Typical Net Worth (mil):** \$5

**68. Elizabeth Armitage**

*Merrill Lynch WM, Cincinnati*

**2017 Rank:** N

**Client Types:** Retail, HNW, UHNW,  
Institutional

**Team Total Assets (mil):** \$2,595

**Typical Acct Size (mil):** \$1.5

**Typical Net Worth (mil):** \$5.56

**69. Kathleen Malone**

*Wells Fargo Advisors, Charlotte, N.C.*

**2017 Rank:** 66

**Client Types:** HNW, UHNW

**Team Total Assets (mil):** \$2,321

**Typical Acct Size (mil):** \$7

**Typical Net Worth (mil):** \$12

**70. Marie Vanerian**

*Merrill Lynch WM, Troy, Mich.*

**2017 Rank:** 64

**Client Types:** Retail, HNW, UHNW,  
Endowments, Institutional

**Team Total Assets (mil):** \$1,264

**Typical Acct Size (mil):** \$20

**Typical Net Worth (mil):** \$20

**71. Sharon Sager**

*UBS Financial Svcs, New York*

**2017 Rank:** 75

**Client Types:** HNW, UHNW,  
Foundations, Endowments, Institutional

**Team Total Assets (mil):** \$1,081

**Typical Acct Size (mil):** \$50

**Typical Net Worth (mil):** \$50

**72. Judy Fredrickson**

*UBS Financial Svcs, Minneapolis*

**2017 Rank:** 61

**Client Types:** HNW, UHNW

**Team Total Assets (mil):** \$1,492

**Typical Acct Size (mil):** \$12

**Typical Net Worth (mil):** \$25

**73. Donna Di Ianni**

*Merrill Lynch WM, Aspen, Colo.*

**2017 Rank:** 59

**Client Types:** HNW, UHNW,  
Foundations

**Team Total Assets (mil):** \$872

**Typical Acct Size (mil):** \$8

**Typical Net Worth (mil):** \$20

**74. Jean Gannon**

*UBS Financial Svcs, Palo Alto*

**2017 Rank:** 72

**Client Types:** UHNW

**Team Total Assets (mil):** \$2,242

**Typical Acct Size (mil):** \$75

**Typical Net Worth (mil):** \$154

**75. Anouchka Balog**

*Morgan Stanley WM*

*Laguna Niguel, Calif.*

**2017 Rank:** 58

**Client Types:** Retail, HNW, UHNW

**Team Total Assets (mil):** \$618

**Typical Acct Size (mil):** \$5

**Typical Net Worth (mil):** \$10

**76. Vanessa Anderson**

*UBS Financial Svcs, Palo Alto*

**2017 Rank:** 69

**Client Types:** UHNW

**Team Total Assets (mil):** \$2,242

**Typical Acct Size (mil):** \$75

**Typical Net Worth (mil):** \$154

**77. Judith McGee**

*Raymond James, Portland, Ore.*

**2017 Rank:** 79

**Client Types:** Retail, HNW,  
Institutional

**Team Total Assets (mil):** \$575

**Typical Acct Size (mil):** \$1

**Typical Net Worth (mil):** \$3

**78. Jana Shoulders**

*Mariner Wealth Advisors, Tulsa, Okla.*

**2017 Rank:** N

**Client Types:** Retail, HNW, UHNW

**Team Total Assets (mil):** \$2,507

**Typical Acct Size (mil):** \$6

**Typical Net Worth (mil):** \$9

**79. Kim Ciccarelli Kantor**

*Ciccarelli Advisory Svcs, Naples, Fla.*

**2017 Rank:** 70

**Client Types:** Retail, HNW, UHNW

**Team Total Assets (mil):** \$1,759

**Typical Acct Size (mil):** \$4

**Typical Net Worth (mil):** \$7

**80. Emily Bach**

*Morgan Stanley WM, Orinda, Calif.*

**2017 Rank:** 89

**Client Types:** Retail, HNW, UHNW

**Team Total Assets (mil):** \$1,067

**Typical Acct Size (mil):** \$4

**Typical Net Worth (mil):** \$6

**81. Louise Armour**

*J.P. Morgan Securities*

*Palm Beach Gardens, Fla.*

**2017 Rank:** 81

**Client Types:** HNW, UHNW,  
Institutional

**Team Total Assets (mil):** \$3,000

**Typical Acct Size (mil):** \$12

**Typical Net Worth (mil):** \$30

**82. Marcie Behman**

*Merrill Lynch PBIG, Boston*

**2017 Rank:** 86

**Client Types:** HNW, UHNW

**Team Total Assets (mil):** \$1,015

**Typical Acct Size (mil):** \$25

**Typical Net Worth (mil):** \$50

**83. Alma Guimarin**

*Morgan Stanley WM, San Jose, Calif.*

**2017 Rank:** N

**Client Types:** Retail, HNW, UHNW

**Team Total Assets (mil):** \$773

**Typical Acct Size (mil):** \$3

**Typical Net Worth (mil):** \$7

# THE POWER TO INSPIRE.

## Congratulations to *Barron's* Top 100 Women Advisors.

We salute the visionaries, innovators, and entrepreneurs who break down barriers, defy expectations, and blaze new trails.

Thank you for helping to raise the bar in our industry. It's this same standard of excellence we aspire to with all that we do for our independent advisors and their clients, every single day.



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Amelia Earhart, Aviation Pioneer

**84. Audree Begay***Ameriprise Financial, Houston***2017 Rank:** 44**Client Types:** Retail, HNW, UHNW**Team Total Assets (mil):** \$870**Typical Acct Size (mil):** \$1.2**Typical Net Worth (mil):** \$2.9**85. Melissa Corrado Harrison***UBS Financial Svcs, Denver***2017 Rank:** N**Client Types:** HNW, UHNW**Team Total Assets (mil):** \$1,015**Typical Acct Size (mil):** \$25**Typical Net Worth (mil):** \$100**86. Christina Collins***Northwestern Mutual, Chicago***2017 Rank:** N**Client Types:** Retail, HNW, UHNW**Team Total Assets (mil):** \$780**Typical Acct Size (mil):** \$2.8**Typical Net Worth (mil):** \$3.5**87. Melissa Spickler***Merrill Lynch WM, Bloomfield Hills, Mich.***2017 Rank:** 87**Client Types:** Retail, HNW, UHNW, Institutional**Team Total Assets (mil):** \$1,095**Typical Acct Size (mil):** \$2**Typical Net Worth (mil):** \$5**88. Lee DeLorenzo***United Asset Strategies, Garden City, N.Y.***2017 Rank:** 95**Client Types:** Retail, HNW, UHNW, Institutional**Team Total Assets (mil):** \$904**Typical Acct Size (mil):** \$1**Typical Net Worth (mil):** \$5**89. Marie Moore***Morgan Stanley WM, Dallas***2017 Rank:** 88**Client Types:** Retail, HNW, UHNW**Team Total Assets (mil):** \$413**Typical Acct Size (mil):** \$2**Typical Net Worth (mil):** \$5**90. Hilary Giles***Merrill Lynch PBIG, Palo Alto***2017 Rank:** 68**Client Types:** HNW, UHNW**Team Total Assets (mil):** \$1,165**Typical Acct Size (mil):** \$20**Typical Net Worth (mil):** \$35**91. Jennifer Man***CIBC Atlantic Trust PWM, San Francisco***2017 Rank:** N**Client Types:** HNW, UNHW, Institutional**Team Total Assets (mil):** \$2,289**Typical Acct Size (mil):** \$8.5**Typical Net Worth (mil):** \$12.5**92. Rita Fiumara***UBS Financial Svcs, Chicago***2017 Rank:** N**Client Types:** Retail, HNW, Institutional**Team Total Assets (mil):** \$1,815**Typical Acct Size (mil):** \$32**Typical Net Worth (mil):** \$15**93. Suzanne Killea***Merrill Lynch PBIG, Palo Alto***2017 Rank:** 74**Client Types:** HNW, UNHW**Team Total Assets (mil):** \$1,165**Typical Acct Size (mil):** \$20**Typical Net Worth (mil):** \$35**94. Rebecca Lerner***Merrill Lynch WM, New York***2017 Rank:** 90**Client Types:** Retail, HNW, UNHW**Team Total Assets (mil):** \$802**Typical Acct Size (mil):** \$3**Typical Net Worth (mil):** \$8**95. Aimee Cogan***Morgan Stanley WM, Sarasota, Fla***2017 Rank:** 85**Client Types:** Retail, HNW, UNHW,

Foundations, Endowments

**Team Total Assets (mil):** \$857**Typical Acct Size (mil):** \$10**Typical Net Worth (mil):** \$20**96. Thais Piotrowski***Ameriprise Financial, Boca Raton, Fla.***2017 Rank:** N**Client Types:** Retail, HNW**Team Total Assets (mil):** \$788**Typical Acct Size (mil):** \$0.75**Typical Net Worth (mil):** \$1.2**97. Carlette McMullan***William Blair & Co., Chicago***2017 Rank:** N**Client Types:** Retail, HNW, UNHW**Team Total Assets (mil):** \$713**Typical Acct Size (mil):** \$2**Typical Net Worth (mil):** \$7**98. Patricia Cutilletta***Morgan Stanley WM, Chicago***2017 Rank:** 93**Client Types:** HNW, UNHW**Team Total Assets (mil):** \$687**Typical Acct Size (mil):** \$8**Typical Net Worth (mil):** \$11**99. Elizabeth Lockwood***UBS Financial Svcs, Houston***2017 Rank:** 98**Client Types:** HNW, UNHW**Team Total Assets (mil):** \$1,970**Typical Acct Size (mil):** \$10**Typical Net Worth (mil):** \$15**100. Anne Golden***First Republic Investment Mgmt, San Francisco***2017 Rank:** 97**Client Types:** Retail, HNW, UNHW, Endowments**Team Total Assets (mil):** \$4,498**Typical Acct Size (mil):** \$3.3**Typical Net Worth (mil):** \$5

N=Not Ranked WM=Wealth Management PWM=Private Wealth Management PBIG=Private Banking and Investment Group Note: For more information on *Barron's* Top Advisors, contact Matt Barthel at [matthew.barthel@barrons.com](mailto:matthew.barthel@barrons.com). *Barron's* publishes four individual financial advisor rankings each year: The Top 100, The Top 100 Women, The Top 100 Independents, and the Top 1,200, which is a state-by-state list. The process of being ranked in *Barron's* starts with filling out a detailed online survey. For information about our nominations process and the online survey, please contact Jennifer Pedone, manager of FA Research: [Jennifer.Pedone@barrons.com](mailto:Jennifer.Pedone@barrons.com).

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