

# Top Wealth Adviser Moms

The right financial pro can pave the way to a solid future. *Working Mother* partnered with SHOOK Research to find the best moms in the biz. Check out the top 200 below. You're sure to find someone great in your area.

Rank	Name	Company	City	State	Typical Net Worth	Typical Size of Household Accounts	Min. Acc't Size for New Business*	Team Assets**
1	Christina Boyd	Merrill Lynch Wealth Management	Wayzata	MN	5-50mm	3-20mm	3mm	\$1,232,828,316
2	Laila Pence	Pence Wealth Management	Newport Beach	CA	2mm	5mm	500k	\$1,357,612,387
3	Cheryl Young	Morgan Stanley Wealth Management	Los Gatos	CA	10mm	7mm	1mm	\$707,896,534
4	Elaine Meyers	JP Morgan Securities	San Francisco	CA	50-300mm	35-300mm	10mm	\$2,251,000,000
5	Sonia Attkiss	UBS Financial Services	New York	NY	25-50mm	15-25mm	2mm	\$2,340,272,055
6	Christy Covalesky	Wetherby Asset Management	San Francisco	CA	30-60mm	20-40mm	10mm	\$4,541,148,000
7	Emily Rubin	UBS Financial Services	New York	NY	5-30mm	5-20mm	5mm	\$1,229,000,000
8	Linnell Sullivan	Merrill Lynch Wealth Management	Cincinnati	OH	5-20mm	4-15mm	2.5mm	\$1,379,066,766
9	Marcie Behman	Merrill Lynch—Private Banking & Investment Group	Boston	MA	15-70mm	8.5-65mm	4mm	\$934,992,473
10	Susan Kim	Ameriprise Financial Services, Inc.	Vienna	VA	1.5-10mm	1.5-3mm	0	\$1,231,000,000
11	Maureen Raille	Merrill Lynch—Private Banking & Investment Group	Chicago	IL	20-40mm	10-20mm	2.5mm	\$5,802,983,053
12	Diane Compardo	Moneta Group Investment Advisors LLC	Clayton	MO	5-25mm	2-7mm	5mm	\$1,013,000,000
13	Teresa Jacobsen	UBS Private Wealth Management	Stamford	CT	15mm	2-40mm	2mm	\$744,509,327
14	Diane Padalino	Merrill Lynch—Private Banking & Investment Group	Denver	CO	10-50mm	30-100mm	10mm	\$1,355,555,943
15	Rachel Gottlieb	UBS Financial Services	New York	NY	2-10mm	1-10mm	1mm	\$750,000,000
16	Rachel Barzilay	Merrill Lynch Wealth Management	Boca Raton	FL	5-20mm	3-15mm	3mm	\$663,590,712
17	Anouchka Balog	Morgan Stanley Wealth Management	Laguna Niguel	CA	3-25mm	1-20mm	1mm	\$561,528,069
18	Courtney Moore	Merrill Lynch—Private Banking & Investment Group	New York	NY	10m-1b	10m-1b	100mm	\$1,132,102,850
19	Ali Phillips	Obermeyer Wood Investment Counsel LLLP	Aspen	CO	2-15mm	2-15mm	1mm	\$1,500,000,000
20	Rebecca Lerner	Merrill Lynch Wealth Management	New York	NY	4-15mm	2-10mm	1mm	\$804,800,268
21	Jennifer Garcia	Wells Fargo Advisors	Encino	CA	10mm	5mm	5mm	\$787,600,000
22	Gillian Yu	Morgan Stanley Private Wealth Management	San Francisco	CA	50mm	20mm	10mm	\$3,184,090,100
23	Ronya Corey	Merrill Lynch Wealth Management	Washington	DC	2-20mm	5-20mm	2mm	\$553,145,216
24	Maria Colucci	Merrill Lynch Wealth Management	New York	NY	10mm	3-10mm	1mm	\$748,758,467
25	Emily Bach	Morgan Stanley Wealth Management	Orinda	CA	5mm	3mm	500k	\$1,018,698,046
26	Alyssa Moeder	Merrill Lynch—Private Banking & Investment Group	New York	NY	25mm	25mm	10mm	\$5,760,921,060
27	Jennifer Ellison	B O S	Redwood City	CA	5-20mm	3-80mm	3mm	\$3,696,173,935
28	Kathleen Youngerman	Morgan Stanley Wealth Management	Chesterfield	MO	10-30mm	5-40mm	1mm	\$381,440,762
29	Danielle Prunier	Merrill Lynch Wealth Management	Century City	CA	15-20mm	5-10mm	0	\$877,665,771
30	Betsy Pakenas	Morgan Stanley Wealth Management	Frederick	MD	4-7mm	2-5mm	1mm	\$709,793,743
31	Inna Kelly	Morgan Stanley Wealth Management	San Francisco	CA	10mm	5mm	10mm	\$1,174,423,836
32	Nancy Popovich	Baird	Reston	VA	1-5mm	500k-5mm	500k	\$230,000,000
33	Janet Franco Gordon	Morgan Stanley Wealth Management	Coral Gables	FL	10mm	3mm	1mm	\$841,777,715
34	Annukka Mikkola	Merrill Lynch Wealth Management	Bellevue	WA	1-7mm	10-17mm	1mm	\$598,036,854
35	Jen Hicks	Wetherby Asset Management	San Francisco	CA	10-60mm	10-25mm	10mm	\$4,541,148,000
36	Beth Scanlan	Morgan Stanley Wealth Management	San Francisco	CA	3-18mm	3-15mm	2mm	\$307,905,576
37	Hanane Lemlih	Wells Fargo Advisors	McLean	VA	10-20mm	5-15mm	1mm	\$1,718,461,921
38	Katie Larsen	Merrill Lynch Wealth Management	Sewickley	PA	3.5-7mm	1.5-5mm	1mm	\$506,554,471
39	Kristina Van Liew	Graystone Consulting	Chicago	IL	100mm	120mm	10mm	\$5,108,837,969
40	Darlene Murphy	Wellesley Asset Management, Inc.	Wellesley	MA	1-25mm	2-10mm	500k	\$2,639,066,312

\*MINIMUM ACCOUNT SIZES ARE GENERAL SINCE IT CAN VARY DEPENDING ON A RANGE OF CIRCUMSTANCES. \*\*ADVISERS ARE JUDGED ON INDIVIDUAL CONTRIBUTION, BUT TOTAL TEAM ASSETS ARE SHOWN.

Rank	Name	Company	City	State	Typical Net Worth	Typical Size of Household Accounts	Min. Acc't Size for New Business*	Team Assets**
41	Sharon Cunningham	Morgan Stanley Wealth Management	New York	NY	2-10mm	1-3.5mm	1mm	\$290,893,086
42	Ruth Berger	RJ Wealth Management—HighTower	New York	NY	3-15mm	2-10mm	1mm	\$442,500,000
43	Michele B. O'Connor	Morgan Stanley Wealth Management	Boston	MA	1.8-15mm	700k-10mm	500k	\$177,251,489
44	Ylisa Seymour	Ameriprise Financial Services Inc.	Santa Rosa	CA	1-5mm	500k-1mm	250k	\$510,000,000
45	Corina Davis	Merrill Lynch Wealth Management	Seattle	WA	2-5mm	1-4mm	1mm	\$517,116,124
46	Cindy Katz Morton	Morgan Stanley Wealth Management	Boca Raton	FL	5-10mm	1-5mm	1mm	\$461,312,212
47	Lauren Pearson	HighTower Twickenham	Birmingham	AL	1-15mm	500k-3mm	0	\$800,000,000
48	Jodi Vleck	Beta Wealth Group Inc.	San Diego	CA	3mm	1.3mm	0	\$205,000,000
49	Mitzi Michaelson	Merrill Lynch Wealth Management	Brentwood	TN	3mm	1mm	250k	\$377,165,121
50	Natalea Simmons	Merrill Lynch Wealth Management	St. Louis	MO	3-15mm	1-15mm	1mm	\$312,178,266
51	Kathy Grasmeder	Morgan Stanley Wealth Management	Glens Falls	NY	1-10mm	1-5mm	100k	\$894,701,877
52	Holley Pierce	Merrill Lynch Wealth Management	Montgomery	AL	300k-12mm	830k	300k	\$119,859,413
53	Judith Lu	Miracle Mile Advisors	Los Angeles	CA	3-15mm	1-4mm	500k	\$765,000,000
54	Renee Fourcade	UBS Financial Services	Los Angeles	CA	8-12mm	8-12mm	100k	\$1,736,489,873
55	Nicole Primack Andres	Merrill Lynch—Private Banking & Investment Group	New York	NY	10-15mm	10-20mm	2.5mm	\$868,208,326
56	Bonnie Richards	UBS Private Wealth Management	New York	NY	10-100mm	10-100mm	10mm	\$772,368,338
57	Michelle Mayer	Merrill Lynch—Private Banking & Investment Group	Washington	DC	5-50mm	5-40mm	5mm	\$440,545,285
58	Malia Morales	Merrill Lynch—Private Banking & Investment Group	Houston	TX	25-50mm	25-50mm	10mm	\$2,312,931,804
59	Cherie Wardrop	Morgan Stanley Wealth Management	Glenview	IL	3.5mm	2.5mm	1mm	\$459,061,884
60	Laura Wellon	UBS Financial Services	Atlanta	GA	8-12mm	3-6mm	1mm	\$1,226,352,029
61	Emily Hill	Morgan Stanley Wealth Management	Lawrence	KS	2-20mm	2.6mm	2mm	\$450,000,000
62	Christina Yuni	Merrill Lynch Wealth Management	Menlo Park	CA	3-15mm	2-10mm	1mm	\$1,459,922,347
63	Annie Etchegoyhen	Merrill Lynch Wealth Management	Menlo Park	CA	5-20mm	3-12mm	0	\$649,476,338
64	Michelle Ward	Morgan Stanley Wealth Management	New York	NY	50mm	1-200mm	0	\$1,960,784,927
65	Elizabeth Evans	Merrill Lynch Wealth Management	Indianapolis	IN	1-8mm	1-6mm	500k	\$648,209,111
66	Julia Carlson	Financial Freedom Wealth Management Group LLC	Newport	OR	1-2mm	350-750k	25k	\$222,816,049
67	Kimberley Hatchett	Morgan Stanley Private Wealth Management	New York	NY	15mm	10mm	5mm	\$690,171,246
68	Brooke May	Merrill Lynch Wealth Management	Indianapolis	IN	1.5-8mm	3-6mm	500k	\$648,209,111
69	Liz Weikes	JP Morgan Securities	New York	NY	25mm-5b	1-10mm	0	\$2,400,000,000
70	Valerie B. Dugan	Morgan Stanley Wealth Management	Hartford	CT	4-15mm	5mm	1mm	\$293,590,208
71	Heather Locus	Balasa Dinverno Foltz LLC	Itasca	IL	2-10mm	1-15mm	1mm	\$3,322,181,672
72	Angela Mwanza	UBS Private Wealth Management	New York	NY	10-100mm	10-100mm	10mm	\$814,048,011
73	Wendy Greeley	Merrill Lynch Wealth Management	Perrysburg	OH	2-20mm	1.5-12.5mm	500k	\$284,784,109
74	Dianna L. Smith	Morgan Stanley Wealth Management	Leawood	KS	10mm	7mm	1mm	\$657,097,564
75	Kristen Trovas	Merrill Lynch Wealth Management	Cedar Rapids	IA	5-10mm	400k-1mm	250k	\$299,447,833
76	Christine Emond	Ameriprise Financial Services Inc.	Fairfax	VA	3.2-34mm	797k-34mm	250k	\$1,164,239,000
77	Mara Bralove	Morgan Stanley Wealth Management	Washington	DC	3-8mm	1-5mm	1mm	\$406,412,432
78	Lynn DeNucci	Merrill Lynch Wealth Management	Springfield	MA	1-10mm	750k-5mm	1mm	\$663,379,330
79	Susan Feitelberg	Morgan Stanley Wealth Management	New York	NY	6mm	2.5mm	1mm	\$161,109,729
80	Shelley Richardson	UBS Financial Services	Los Gatos	CA	2-50mm	2-20mm	500k	\$830,432,764
81	Susan Harrington	Morgan Stanley Wealth Management	Rockville	MD	5mm	3mm	1mm	\$252,438,704
82	Dawn Starks	Raymond James Financial Services	Asheville	NC	500k-1mm	500k-1.2mm	500k	\$161,065,516
83	Betsy Nelson	UBS Private Wealth Management	Chicago	IL	15-20mm	20-40mm	2mm	\$465,000,000

Rank	Name	Company	City	State	Typical Net Worth	Typical Size of Household Accounts	Min. Acc't Size for New Business*	Team Assets**
84	Karen Robbins	UBS Financial Services	Newtown	PA	3-7mm	1-3mm	500k	\$593,459,014
85	Thais Piotrowski	Ameriprise Financial Services Inc.	Boca Raton	FL	3-5mm	750k-54mm	500k	\$332,291,000
86	Tiffany Kellner	UBS Financial Services	Miamisburg	OH	3-10mm	1-5mm	1mm	\$920,000,000
87	Michele Dandrea	Morgan Stanley Wealth Management	McLean	VA	2-10mm	1-5mm	1mm	\$289,659,239
88	Amy Cady	Wells Fargo Advisors	Bartlesville	OK	2-5mm	500k-1mm	250k	\$250,000,000
89	Christina Paul	Morgan Stanley Wealth Management	New York	NY	8mm	5mm	1mm	\$259,891,449
90	Catherine Gerst	UBS Financial Services	Los Angeles	CA	10-50mm	10mm	2.5mm	\$891,000,000
91	Amber Seale	Raymond James & Associates	Dallas	TX	2-80mm	1-15mm	0	\$130,500,000
92	Barbara Blacklock	Wells Fargo Advisors	Boca Raton	FL	1-5mm	1-5mm	1mm	\$286,000,000
93	Kate Waters	Morgan Stanley Wealth Management	New York	NY	2-50mm	2-20mm	0	\$900,024,502
94	Kelli Rogan	Merrill Lynch Wealth Management	Duluth	GA	3-10mm	2.5-8mm	1mm	\$664,231,944
95	Haley Kaufman	Merrill Lynch Wealth Management	Washington	DC	3-8mm	2-5mm	1mm	\$616,434,448
96	Merle Zislin	Morgan Stanley Wealth Management	Boca Raton	FL	2-8mm	500k-3mm	250k	\$219,409,425
97	Heather Barnett	Wells Fargo Advisors	Keokuk	IA	500k-5mm	250k-2.5mm	250k	\$185,215,474
98	Susanna Bracke	UBS Financial Services	Palo Alto	CA	5-25mm	1-20mm	3mm	\$217,554,355
99	Marta Shen	Raymond James & Associates	Atlanta	GA	600k-3mm	250k-10mm	1mm	\$150,000,000
100	Judy Ross	Wells Fargo Advisors	Woodstock	GA	1.5-12mm	450k-2.5mm	250k	\$216,600,000
101	Elizabeth Engelmann	UBS Financial Services	Bloomington	MN	2-10mm	1-6mm	1mm	\$228,225,407
102	Mary Helen Condon Moore	Merrill Lynch Wealth Management	Charleston	SC	3mm	1mm	500k	\$466,466,815
103	Laura Cusenbary	Wells Fargo Advisors	Steamboat Springs	CO	3-7.5mm	1-3mm	250k	\$405,000,000
104	Sallie Behnke	Morgan Stanley Wealth Management	Dallas	TX	10-20mm	7-15mm	1mm	\$698,848,325
105	Mary Sexton	Morgan Stanley Wealth Management	Washington	DC	2-30mm	1-10mm	0	\$352,259,579
106	Danielle Grande-Cosentino	Merrill Lynch Wealth Management	White Plains	NY	1-10mm	1-17mm	1mm	\$306,880,816
107	Cassandra Smalley	Doyle Wealth Management	St. Petersburg	FL	2-5mm	1-5mm	500k	\$758,000,000
108	Kristen Scarpa Bissett	UBS Financial Services	West Palm Beach	FL	5-200mm	10-150mm	2mm	\$979,000,000
109	Katerina Simonetti	UBS Private Wealth Management	Philadelphia	PA	5-85mm	2.5-55mm	200k	\$520,000,000
110	Anh Tran	JanHobbs Financial Group	Orange	CA	750k-1mm	1-12mm	1mm	\$230,000,000
111	Lisa Howe	Wells Fargo Advisors	Troy	OH	350k-1mm	250-750k	100k	\$521,932,122
112	Mary L. Tomanek	Graystone Consulting	Deerfield	IL	10-60mm	1-80mm	10mm	\$1,593,051,850
113	Heather Goodbody	Merrill Lynch—Private Banking & Investment Group	Pittsford	NY	100mm	20mm	5mm	\$579,292,362
114	Winnie Sun	Sun Group Wealth Partners	Irvine	CA	300k-5mm	10k-2mm	5k	\$225,000,000
115	Sandi Bragar	Aspiriant	San Francisco	CA	7-75mm	9-50mm	1.5mm	\$10,800,700,432
116	Kelly Bolton	Merrill Lynch Wealth Management	Germantown	TN	2.5mm	1mm	250k	\$647,565,059
117	Heather Churchill	Morgan Stanley Wealth Management	Orlando	FL	1.5-7.5mm	850k-5mm	1mm	\$413,672,258
118	Claudine Callison-Siero	Morgan Stanley Wealth Management	Little Falls	NJ	2.5-20mm	1-2.5mm	1mm	\$1,345,358,087
119	Karen Keusayan	Wells Fargo Advisors	Los Angeles	CA	2-25mm	5-20mm	1mm	\$1,115,000,000
120	Sheri Billings	Merrill Lynch Wealth Management	Weston	FL	2-10mm	2-15mm	1mm	\$408,873,219
121	Rita McCluskey	Merrill Lynch Wealth Management	Indianapolis	IN	2.5mm	2mm	1mm	\$202,861,159
122	Fay DeBellis	Morgan Stanley Wealth Management	Minneapolis	MN	15mm	2-10mm	1mm	\$220,518,977
123	Cassie Kosinski	Wells Fargo Advisors	Anchorage	AK	750k-2mm	100k-2mm	500k	\$150,923,398
124	Jenny Santek	Morgan Stanley Wealth Management	Madison	WI	1-8mm	500k-5mm	250k	\$181,963,852
125	Camille Gagliardi	Ameriprise Financial Services Inc.	West Hartford	CT	1.2mm	550k	250k	\$190,000,000
126	Amy Thalman	Merrill Lynch Wealth Management	Charlotte	NC	5mm	2mm	500k	\$181,732,046

Rank	Name	Company	City	State	Typical Net Worth	Typical Size of Household Accounts	Min. Acc't Size for New Business*	Team Assets**
127	Stephanie Smith Christiano	Merrill Lynch Wealth Management	Dover	DE	875k-4.5mm	600k-3.5mm	0	\$384,128,061
128	Jennifer Kraus	UBS Financial Services	New York	NY	5-20mm	3-10mm	1mm	\$677,631,000
129	Janette Acton	Merrill Lynch Wealth Management	Oak Brook	IL	1-10mm	1-10mm	750k	\$333,683,948
130	Sara Pitcel	Morgan Stanley Wealth Management	Waukesha	WI	1-10mm	500k-5mm	0	\$458,515,017
131	Michele McCallion	Merrill Lynch—Private Banking & Investment Group	Greenwich	CT	20-50mm	10-50mm	10mm	\$340,858,939
132	Kimberly Evans	Wells Fargo Advisors	Atlanta	GA	4-20mm	500k-4mm	300k	\$200,000,000
133	Danielle Gilbert-Richard	Merrill Lynch Wealth Management	Burlington	VT	5mm	1-5mm	500k	\$406,739,828
134	Mindy Fishel	Alex.Brown/Raymond James	San Francisco	CA	1.5-6.5mm	1.5-6.5mm	1mm	\$360,000,000
135	Lisa Santo	Morgan Stanley Wealth Management	New York	NY	5-25mm	3-10mm	1mm	\$910,182,370
136	Samantha Parker Hopkins	UBS Financial Services	Tampa	FL	1-4.5mm	1-4.5mm	1mm	\$338,000,000
137	Sharon Callender Snowden	UBS Financial Services	Houston	TX	2-10mm	1.125mm	1mm	\$437,045,471
138	Stacey Barrins	Morgan Stanley Wealth Management	Chicago	IL	2-15mm	1-10mm	1mm	\$595,270,776
139	Elana Milianta	Wells Fargo Advisors	Greenwich	CT	5-20mm	1-5mm	1mm	\$150,000,000
140	Kimberlee Bouska	Raymond James Financial Services	Beaverton	OR	400k-1.25mm	250k-1.5mm	100k	\$145,493,123
141	Catherine Fang	Morgan Stanley Wealth Management	Menlo Park	CA	5-15mm	1.5-5mm	1mm	\$185,885,661
142	Mary Batcha	Merrill Lynch Wealth Management	Yardley	PA	1-8mm	1-16mm	1mm	\$326,903,509
143	Sharon Starkey	Wells Fargo Advisors	Denver	CO	1-7mm	250k-5mm	250k	\$197,000,000
144	Joyce Streithorst	Frisch Financial Group Inc.	Melville	NY	500k-5mm	1-7mm	500k	\$400,000,000
145	Jenna Suleman	Wells Fargo Advisors	Miami	FL	10-100mm	3-10mm	0	\$481,325,726
146	Felicia Di Silvestro	Morgan Stanley Wealth Management	Chicago	IL	5-10mm	3-7mm	1mm	\$262,696,686
147	Lori Gervais	Baird	Mequon	WI	1-10mm	1-5mm	1mm	\$317,959,580
148	Jessica Wunder	McLean Asset Management	McLean	VA	5-7mm	2-4mm	500k	\$360,000,000
149	Stephanie Saunders	Morgan Stanley Wealth Management	Easton	MD	5-10mm	1-3mm	1mm	\$953,628,721
150	Kari Boxleitner	Wells Fargo Advisors	Loveland	CO	1-5mm	800k-2mm	0	\$147,000,000
151	Andrea James	Wells Fargo Advisors	Clive	IA	1-5mm	250k-5mm	250k	\$226,466,336
152	Kay Grasman	Morgan Stanley Wealth Management	New York	NY	10-50mm	5-10mm	1mm	\$813,293,483
153	Kim Luu-Tu	Ameriprise Financial Services, Inc.	Vienna	VA	1mm	650k	500k	\$464,750,000
154	Rosalie Hunter	Merrill Lynch—Private Banking & Investment Group	Philadelphia	PA	25mm	50mm	5mm	\$567,240,710
155	Dawn Smith	Ameriprise Financial Services, Inc.	Hopkinton	MA	3mm	3mm	0	\$250,000,000
156	Sandra Wang	Morgan Stanley Wealth Management	Palo Alto	CA	2-8mm	1-5mm	1mm	\$541,174,861
157	Michelle Mabry	Client 1st Advisory Group	Hattiesburg	MS	1-10mm	1-3mm	500k	\$190,000,000
158	Dawn Dupre	Morgan Stanley Wealth Management	Berwyn	PA	2mm	1.25mm	250k	\$191,351,050
159	Miye Wire	MiyeWire, LLC	Reston	VA	400k-1mm	100k-2mm	200k	\$119,573,400
160	Carolyn Weaver	Morgan Stanley Wealth Management	Peoria	IL	1mm	1mm	500k	\$319,780,733
161	Ileana Dominguez	UBS Financial Services	Henderson	NV	1-50mm	500k-40mm	1mm	\$250,391,000
162	Jessica Kartzinel	UBS Financial Services	Henderson	NV	1-50mm	500k-40mm	1mm	\$250,391,000
163	Maureen Novak	Morgan Stanley Wealth Management	Syracuse	NY	2-20mm	1-10mm	1mm	\$269,895,900
164	Galit Ben-Joseph	JP Morgan Securities	New York	NY	10mm	3-5mm	0	\$90,000,000
165	Lisa Purtell	Morgan Stanley Wealth Management	Fresno	CA	4mm	1.5mm	1mm	\$197,750,468
166	YC Lama	Morgan Stanley Wealth Management	Beverly Hills	CA	5-30mm	1-7mm	1mm	\$111,164,433
167	Sarah Damsgaard	JP Morgan Securities	Chicago	IL	10mm-5b	5-250mm	5mm	\$550,000,000
168	Jen Haldemann	Baird	Milwaukee	WI	5mm	2mm	1mm	\$475,070,000
169	Adrianne Yamaki	Morgan Stanley Wealth Management	San Francisco	CA	5mm	3-10mm	2mm	\$80,332,509

Rank	Name	Company	City	State	Typical Net Worth	Typical Size of Household Accounts	Min. Acc't Size for New Business*	Team Assets**
170	Elizabeth Flavin Crawford	Sendero Wealth Management	San Antonio	TX	15mm	10-15mm	5mm	\$3,200,000,000
171	Amanda Manske	Prime Financial Services	Wauwatosa	WI	750k	750k	0	\$200,000,000
172	Rachel Cohen	Morgan Stanley Wealth Management	West Conshohocken	PA	1-10mm	1-13mm	1mm	\$276,876,268
173	Sarah Man	Morgan Stanley Wealth Management	Westport	CT	2-10mm	750k-4mm	500k	\$412,121,204
174	Limei Yu	UBS Financial Services	Chicago	IL	1-50mm	500k-25mm	500k	\$1,060,000,000
175	Samantha Price-Koontz	Merrill Lynch Wealth Management	Montvale	NJ	1-2.5mm	100-500k	500k	\$113,820,157
176	Eva Marina Ovejero	Morgan Stanley Wealth Management	Miami	FL	2-20mm	1-10mm	1mm	\$214,150,097
177	Ariel Jacobs	Merrill Lynch Wealth Management	Fort Lee	NJ	1-20mm	800k-4mm	250k	\$805,471,781
178	Noel Brown	Morgan Stanley Wealth Management	Honolulu	HI	2-20mm	2-20mm	0	\$211,189,451
179	Leanne Scull	Raymond James & Associates	Memphis	TN	1mm	2mm	0	\$143,832,307
180	Katie Solvesky	Merrill Lynch Wealth Management	Canfield	OH	3-35mm	1-25mm	3mm	\$1,005,640,734
181	Barbara Virany	Morgan Stanley Wealth Management	Pittsburgh	PA	2-6mm	4mm	1mm	\$207,176,031
182	Michelle Kuzma Kempf	VWG Wealth Management—HighTower	Vienna	VA	5-12mm	3-10mm	1mm	\$1,600,000,000
183	Marilyn Keyser	Morgan Stanley Wealth Management	Purchase	NY	5-10mm	2-5mm	2mm	\$735,965,332
184	Patti Koogler	Ameriprise Financial Services Inc.	Waynesboro	VA	2.5mm	1.507mm	0	\$129,000,000
185	Sabina Sewillo	Morgan Stanley Wealth Management	Chicago	IL	6mm	2-4mm	1mm	\$897,948,890
186	Kim Curtis	Wealth Legacy Institute	Denver	CO	1-3mm	750k-2mm	500k	\$103,000,000
187	Christina Schatz	Morgan Stanley Wealth Management	New York	NY	5mm	5mm	0	\$499,037,275
188	Melissa Joy	Raymond James Financial Services	Southfield	MI	1-12mm	500k-10mm	350mm	\$980,725,773
189	MaryAnn Pietromonaco	Morgan Stanley Wealth Management	Cincinnati	OH	2.5mm	700k	500k	\$220,454,108
190	Melinda Brewer	Morgan Stanley Wealth Management	Oklahoma City	OK	2mm	1mm	100k	\$632,242,095
191	Dana Nightingale	Obermeyer Wood Investment Counsel LLLP	Denver	CO	2-15mm	2-15mm	1mm	\$1,500,000,000
192	Cynthia Lee	Wells Fargo Advisors	Honolulu	HI	2-10mm	500k-3mm	1mm	\$138,185,588
193	Tammy Escobar-Miller	Morgan Stanley Wealth Management	Scottsdale	AZ	1-3mm	750k-2mm	500k	\$166,337,720
194	Courtnie Nein	Good Life Advisors	Wyomissing	PA	650-750k	250k-1.5mm	0	\$1,309,017,337
195	Kate Eiland	Wells Fargo Advisors	Fresno	CA	500k-10mm	150k-2mm	250k	\$137,000,000
196	Courtney Lisecki	Morgan Stanley Wealth Management	New York	NY	2-15mm	2-15mm	500k	\$383,763,914
197	Deana Calvelli	Lockton Investment Advisors LLC	Blue Bell	PA	10-40mm	450mm	0	\$50,000,000,000
198	Meghan Railey	Wells Fargo Advisors	San Francisco	CA	2.5-15mm	1-2.5mm	2.5mm	\$500,000,000
199	Roz O'Connor	Morgan Stanley Wealth Management	New York	NY	1-20mm	3-10mm	1mm	\$429,966,425
200	Noelle Smith	Innovative Financial Planning	Mahwah	NJ	500k-2mm	250k-1mm	0	\$190,000,000

## About SHOOK Research

As America's only wealth adviser research organization, SHOOK Research recognizes the most outstanding wealth advisers in the business. The firm's host of quantitative and qualitative deep due-diligence measures includes telephone and in-person meetings. The firm shares its best practices research through conferences and speaking engagements. SHOOK gives back by raising more than \$300 million for the world of philanthropy. For more information, see [shookresearch.com](http://shookresearch.com).

## METHODOLOGY

SHOOK Research considered wealth advisers who are mothers with at least one child living at home and under the age of 18. Ranking algorithm is based on qualitative measures derived from telephone and in-person interviews and surveys: service models, investing process, client retention, industry experience, review of compliance records, firm nominations, etc.; and quantitative criteria, such as assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisers rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research LLC. Neither SHOOK nor *Working Mother* receives compensation from the advisers or their firms in exchange for placement on a ranking.