

2018 TOP WEALTH ADVISOR MOMS

Rank	Name	Company	City	State	Typical Net Worth	Typical Size of Household Accounts	Min. Account Size for New Business*	Team Assets**
1	Cheryl Young	Morgan Stanley Wealth Management	Los Gatos	CA	\$10-35M	\$2-10M	\$2M	\$857M
2	Christina Boyd	Merrill Lynch Wealth Management	Wayzata	MN	\$5-50M	\$3-30M	\$3M	\$1.2B
3	Elaine Meyers	JP Morgan Securities	San Francisco	CA	\$50-300M	\$35-300M	\$10M	\$2.8B
4	Sonia Attkiss	UBS Financial Services Inc.	New York	NY	\$25-50M	\$15-25M	\$2M	\$2.4B
5	Laila Pence	Pence Wealth Management	Newport Beach	CA	\$2M	\$500K-11.5M	\$2M	\$1.3B
6	Emily Rubin	UBS Financial Services Inc.	New York	NY	\$5-30M	\$5-20M	\$5M	\$1.3B
7	Linnell Sullivan	Merrill Lynch Wealth Management	Cincinnati	OH	\$5-20M	\$4-15M	\$2.5M	\$1B
8	Faith Xenos	Singer Xenos Schechter Sosler Wealth Management	Coral Gables	FL	\$4-11M	\$2-10M	\$1M	\$1.5B
9	Teresa Jacobsen	UBS Financial Services Inc.	Stamford	CT	\$10-40M	\$5-40M	\$2M	\$833M
10	Marcie Behman	Merrill Lynch — Private Banking & Investment Group	Boston	MA	\$15-70M	\$8.5-65M	\$4M	\$1B
11	Carlette McMullan	William Blair & Co.	Chicago	IL	\$4-10M	\$1-3M	\$500K	\$642M
12	Maureen Raihle	Merrill Lynch — Private Banking & Investment Group	Chicago	IL	\$20-40M	\$10-20M	\$2.5M	\$1.8B
13	Jessica Guo	UBS Financial Services Inc.	Wellesley	MA	\$2-20M	\$1-40M	\$1M	\$373M
14	Susan Kim	Ameriprise Financial	Vienna	VA	\$1.7-12M	\$1.7-3.5M	\$0	\$523M
15	Ali Phillips	Obermeyer Wood Investment Counsel	Aspen	CO	\$2-15M	\$1-10M	\$1M	\$1.6B
16	Anouchka Balog	Morgan Stanley Wealth Management	Laguna Niguel	CA	\$3-25M	\$1-20M	\$1M	\$617M
17	Diane Compardo	Moneta Group Investment Advisors	Clayton	MO	\$5-25M	\$3-10M	\$5M	\$1.2B
18	Inna Kelly	Morgan Stanley Wealth Management	San Francisco	CA	\$10-50M	\$5-20M	\$10M	\$1.3B
19	Jennifer L. Garcia	Wells Fargo Advisors	Encino	CA	\$10M	\$5-25M	\$5M	\$823M
20	Aimee Cogan	Morgan Stanley Wealth Management	Sarasota	FL	\$20-50M	\$15-25M	\$1M	\$821M
21	Rachel Gottlieb	UBS Financial Services Inc.	New York	NY	\$5-15M	\$1-10M	\$1M	\$735M
22	Rachel Barzilay	Merrill Lynch Wealth Management	Boca Raton	FL	\$5-20M	\$3-15M	\$3M	\$847M
23	Emily Bach	Morgan Stanley Wealth Management	Orinda	CA	\$4-10M	\$3-7M	\$1M	\$1B
24	Rebecca Lerner	Merrill Lynch Wealth Management	New York	NY	\$4-15M	\$2-10M	\$1M	\$801M
25	Anna Winderbaum	Morgan Stanley Private Wealth Management	New York	NY	\$40-50M	\$25-30M	\$2M	\$1.5B
26	Danielle Prunier	Merrill Lynch Wealth Management	Century City	CA	\$15-20M	\$5-20M	\$0	\$976M
27	Kathleen Youngerman	Morgan Stanley Private Wealth Management	Chesterfield	MO	\$10-100M	\$5-40M	\$2M	\$311M
28	Alyssa Moeder	Merrill Lynch — Private Banking & Investment Group	New York	NY	\$25M	\$25M	\$10M	\$6.1B
29	Jennifer Ellison	BJQS	Redwood City	CA	\$5-20M	\$3-80M	\$3M	\$4B
30	Beth Scanlan	Morgan Stanley Wealth Management	San Francisco	CA	\$5-25M	\$3-15M	\$2M	\$355M
31	Ronya Corey	Merrill Lynch Wealth Management	Washington	DC	\$2-20M	\$5-20M	\$2M	\$670M
32	Gillian Yu	Morgan Stanley Private Wealth Management	San Francisco	CA	\$50-100M	\$20-50M	\$10M	\$4.2B
33	Wendy Holmes	UBS Financial Services Inc.	New York	NY	\$10-100M	\$4-100M	\$10M	\$1B
34	Maria Colucci	Merrill Lynch Wealth Management	New York	NY	\$10M	\$3-10M	\$1M	\$706M
35	Kalyn Walker	UBS Financial Services Inc.	San Diego	CA	\$2-10M	\$1-5.5M	\$1M	\$1B
36	Christy Covalesky	Wetherby Asset Management	San Francisco	CA	\$30-60M	\$20-40M	\$10M	\$4.8B
37	Lisa A. Petrie	Wells Fargo Advisors	Long Beach	CA	\$2-10M	\$1.5-5M	\$500K	\$223M
38	Betsy Pakenas	Morgan Stanley Wealth Management	Frederick	MD	\$4-7M	\$2-5M	\$1M	\$747M
39	Annukka Mikkola	Merrill Lynch Wealth Management	Bellevue	WA	\$1-7M	\$10-17M	\$1M	\$651M
40	Diane Padalino	Merrill Lynch — Private Banking & Investment Group	Denver	CO	\$10-50M	\$30-100M	\$10M	\$1.4B
41	Sherry Verburgt	UBS Financial Services Inc.	Houston	TX	\$1-3M	\$500K-2.5M	\$250K	\$825M
42	Jen Hicks	Wetherby Asset Management	San Francisco	CA	\$10-60M	\$10-25M	\$10M	\$4.8B
43	Michele B. O'Connor	Morgan Stanley Wealth Management	Boston	MA	\$1.8-19M	\$800K-13M	\$500K	\$213M
44	Katie Larsen	Merrill Lynch Wealth Management	Sewickley	PA	\$3.5-7M	\$1.5-5M	\$1M	\$567M
45	Hanane Lemlih	Wells Fargo Advisors	McLean	VA	\$10-20M	\$5-15M	\$1M	\$1.2B
46	Janet Franco Gordon	Morgan Stanley Wealth Management	Coral Gables	FL	\$10M	\$3M	\$1M	\$798M
47	Corina Davis	Merrill Lynch Wealth Management	Seattle	WA	\$2-5M	\$1-4M	\$1M	\$563M
48	Judith Lu	Miracle Mile Advisors	Los Angeles	CA	\$10-20M	\$3-5M	\$1M	\$1B
49	Kristina Van Liew	Graystone Consulting	Chicago	IL	\$10-100M	\$10-120M	\$10M	\$4.1B
50	Darlene Murphy	Wellesley Asset Management	Wellesley	MA	\$1-25M	\$2-10M	\$500K	\$2.7B
51	Michelle Mayer	Merrill Lynch — Private Banking & Investment Group	Naples	FL	\$5-50M	\$5-40M	\$5M	\$618M
52	Cindy Katz Morton	Morgan Stanley Wealth Management	Boca Raton	FL	\$5-10M	\$1-5M	\$1M	\$521M
53	Kathy Grasmeder	Morgan Stanley Wealth Management	Glens Falls	NY	\$1-10M	\$1-5M	\$100K	\$967M
54	Natalea Simmons	Merrill Lynch Wealth Management	St. Louis	MO	\$3-15M	\$1-15M	\$1M	\$326M
55	Rhonda Finby	Wells Fargo Advisors	Long Beach	CA	\$2-20M	\$850K-5M	\$300K	\$350M
56	Ruth Berger	HighTower Advisors	New York	NY	\$3-15M	\$2-10M	\$1M	\$449M
57	Sharon Cunningham	Morgan Stanley Wealth Management	New York	NY	\$3.5-10M	\$1-3.5M	\$1M	\$304M
58	Kimberly Hunter	Wells Fargo Advisors	Santa Rosa	CA	\$3-30M	\$2-20M	\$3M	\$700M
59	Nancy Popovich	Baird	McLean	VA	\$1-5M	\$500K-5M	\$500K	\$240M
60	Liz Welkes	JP Morgan Securities	New York	NY	\$25M-1B	\$5-25M	\$1M	\$2.4B
61	Sara Wohl	Merrill Lynch Wealth Management	Ann Arbor	MI	\$1-10M	\$1-8M	\$500K	\$347M
62	Jodi Vleck	Beta Wealth Group	San Diego	CA	\$3M	\$1.7M	\$0	\$230M
63	Stephanie Ackler	Wells Fargo Advisors	New York	NY	\$2.5-15M	\$1-10M	\$1M	\$232M
64	Nicole Primack Andres	Merrill Lynch — Private Banking & Investment Group	New York	NY	\$10-15M	\$10-20M	\$2.5M	\$1B

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65	Mary Ellen Krueger	Aspiriant	Milwaukee	WI	\$7-75M	\$9-50M	\$15M	\$12.1B
66	Jennifer Haggerty	Merrill Lynch — Private Banking & Investment Group	Pittsburgh	PA	\$20-50M	\$15-40M	\$10M	\$927M
67	Laura Wellon	UBS Financial Services Inc.	Atlanta	GA	\$8-12M	\$3-10M	\$1M	\$1.1B
68	Ylisa Sanford	Ameriprise Financial	Santa Rosa	CA	\$750K-4M	\$500K-25M	\$0	\$280M
69	Elizabeth Evans	Merrill Lynch Wealth Management	Indianapolis	IN	\$1.5-8M	\$1-6M	\$500K	\$709M
70	Brooke May	Merrill Lynch Wealth Management	Indianapolis	IN	\$1.5-8M	\$3-6M	\$500K	\$709M
71	Cherie Wardrop	Morgan Stanley Wealth Management	Glenview	IL	\$3.5-20M	\$2-4M	\$1M	\$557M
72	Xi Qiao	UBS Financial Services Inc.	San Francisco	CA	\$1-100M	\$1-5M	\$1M	\$484M
73	Angela Mwanza	UBS Financial Services Inc.	New York	NY	\$10-100M	\$10-100M	\$10M	\$500M
74	Courtney Moore	Merrill Lynch — Private Banking & Investment Group	New York	NY	\$10M-1B	\$10M-1B	\$10M	\$1.1B
75	Mitzi Michaelson	Merrill Lynch Wealth Management	Brentwood	TN	\$3M	\$1M	\$250K	\$358M
76	Bonnie Richards	UBS Financial Services Inc.	New York	NY	\$10-100M	\$10-100M	\$10M	\$341M
77	Christina Yuni	Merrill Lynch Wealth Management	Menlo Park	CA	\$3-15M	\$2-10M	\$1M	\$1.6B
78	Mara Bralove	Morgan Stanley Wealth Management	Washington	DC	\$1-8M	\$1-7M	\$1M	\$445M
79	Haley Kaufman	Merrill Lynch Wealth Management	Washington	DC	\$3-8M	\$2-5M	\$1M	\$800M
80	Anh Tran	JanHobbs Financial Group	Orange	CA	\$750K-10M	\$1-12M	\$1M	\$250M
81	Nadine Faulis	Merrill Lynch Wealth Management	Las Vegas	NV	\$5-20M	\$3-10M	\$1M	\$728M
82	Emily Hill	Morgan Stanley Wealth Management	Lawrence	KS	\$2-20M	\$2.6-15M	\$2M	\$485M
83	Heather Locus	BDF	Itasca	IL	\$2-10M	\$1-15M	\$1M	\$4B
84	Dianna L. Smith	Morgan Stanley Wealth Management	Leawood	KS	\$5-15M	\$3-12M	\$1M	\$881M
85	Annie Etchegoyhen	Merrill Lynch Wealth Management	Menlo Park	CA	\$5-20M	\$3-12M	\$0	\$705M
86	Kimberley Hatchett	Morgan Stanley Private Wealth Management	New York	NY	\$5-50M	\$2.5M	\$5M	\$803M
87	Shelley Richardson	UBS Financial Services Inc.	Los Gatos	CA	\$2-50M	\$2-20M	\$1M	\$944M
88	Susan Harrington	Morgan Stanley Wealth Management	Rockville	MD	\$5-8M	\$1-3M	\$1M	\$247M
89	Malia Morales	Merrill Lynch — Private Banking & Investment Group	Houston	TX	\$25-50M	\$25-50M	\$10M	\$2.5B
90	Valerie Dugan	Morgan Stanley Wealth Management	Hartford	CT	\$5-80M	\$5-40M	\$1M	\$315M
91	Holley Pierce	Merrill Lynch Wealth Management	Montgomery	AL	\$300K-12M	\$830K	\$300K	\$132M
92	Beth Norman	RBC Wealth Management	Madison	WI	\$500K-3M	\$250K-1.5M	\$0	\$517M
93	Seema Khanna	Morgan Stanley Wealth Management	New York	NY	\$20-100M	\$20-25M	\$5M	\$198M
94	Julia Carlson	Financial Freedom Wealth Management Group	Newport	OR	\$1-2.5M	\$350K-1M	\$5K	\$234M
95	Michele Dandrea	Morgan Stanley Wealth Management	McLean	VA	\$1.2-10M	\$1-6M	\$1M	\$360M
96	Laura Steckler	Steckler Wealth Management Group of Raymond James	Coral Gables	FL	\$500K-4M	\$500K-2.5M	\$500K	\$203M
97	Andrea Berardino Bevis	UBS Financial Services Inc.	Boston	MA	\$10-100M	\$5-30M	\$5M	\$602M
98	Wendy Greeley	Merrill Lynch Wealth Management	Perrysburg	OH	\$2-20M	\$1.5-12.5M	\$500K	\$308M
99	Julie Shechtman	Morgan Stanley Wealth Management	Glenview	IL	\$500K-6M	\$1-5M	\$500K	\$205M
100	Dawn Starks	Raymond James Financial Services	Asheville	NC	\$500K-2.5M	\$500K-2.5M	\$500K	\$176M
101	Susan Feitelberg	Morgan Stanley Wealth Management	New York	NY	\$3-15M	\$1-5M	\$1M	\$199M
102	Danielle Grande-Cosentino	Merrill Lynch Wealth Management	White Plains	NY	\$1-10M	\$1-17M	\$1M	\$354M
103	Michelle Young	Ameriprise Financial	Edina	MN	\$650K-8M	\$500K-6M	\$500K	\$285M
104	Karen Robbins	UBS Financial Services Inc.	Newtown	PA	\$1.5-8M	\$1-3M	\$500K	\$630M
105	Ryan Mathes	Ameriprise Financial	The Woodlands	TX	\$500K-6M	\$300K-3M	\$1M	\$594M
106	Betsy Nelson	UBS Financial Services Inc.	Chicago	IL	\$12-25M	\$15-40M	\$2M	\$427M
107	Diane McMinds	UBS Financial Services Inc.	Napa	CA	\$1-8M	\$100K-2.5M	\$250K	\$323M
108	Kimberlee Barrett-Johnson	Ameriprise Financial	Charlottesville	VA	\$1-10M	\$500K-6M	\$250K	\$160M
109	Ariel Jacobs	Merrill Lynch Wealth Management	Fort Lee	NJ	\$1-20M	\$800K-4M	\$250K	\$931M
110	Joanne Zhong	UBS Financial Services Inc.	San Francisco	CA	\$10-50M	\$5-20M	\$5M	\$500M
111	Melissa Fiammio Clark	Wells Fargo Advisors	Melbourne	FL	\$500K-10M	\$250K-5M	\$250K	\$275M
112	Kathleen Lach	UBS Financial Services Inc.	Columbus	OH	\$2-7M	\$800K-5M	\$1M	\$208M
113	Christine Emond	Ameriprise Financial	Fairfax	VA	\$2.5-25M	\$3.3-35M	\$500K	\$474M
114	Alexandra Van Meurs	UBS Financial Services Inc.	Houston	TX	\$1-25M	\$1-10M	\$250K	\$249M
115	Carolyn Weaver	Morgan Stanley Wealth Management	Peoria	IL	\$1M	\$1-2M	\$500K	\$450M
116	Thais Piotrowski	Ameriprise Financial	Boca Raton	FL	\$3-5M	\$750K-6M	\$500K	\$315M
117	Tiffany Kellner	UBS Financial Services Inc.	Miamisburg	OH	\$3-10M	\$1-5M	\$1M	\$1.2B
118	Kristen Trovas	Merrill Lynch Wealth Management	Cedar Rapids	IA	\$5-10M	\$400K-1M	\$250K	\$307M
119	Amy Cady	Wells Fargo Advisors	Bartlesville	OK	\$2-5M	\$500K-1M	\$250K	\$273M
120	Christina Paul	Morgan Stanley Wealth Management	New York	NY	\$2-15M	\$1-16M	\$1M	\$253M
121	Barbara J. Blacklock	Wells Fargo Advisors	Boca Raton	FL	\$1-5M	\$1-10M	\$1M	\$282M
122	Kate Waters	Morgan Stanley Wealth Management	New York	NY	\$5-50M	\$2-20M	\$0	\$383M
123	Ayesha Yasin	RBC Wealth Management	Washington	DC	\$6-8M	\$3-5M	\$1M	\$172M
124	Kelli Rogan	Merrill Lynch Wealth Management	Duluth	GA	\$3-10M	\$2.5-8M	\$1M	\$755M
125	Merle Zislin	Morgan Stanley Wealth Management	Boca Raton	FL	\$2-8M	\$500K-3M	\$250K	\$229M
126	Jill Lawrence	Ameriprise Financial	Golden Valley	MN	\$1-4M	\$800K-3M	\$800K	\$452M
127	Sallie Behnke	Morgan Stanley Wealth Management	Dallas	TX	\$10-80M	\$7-50M	\$1M	\$862M
128	Amber Seale	Seale Wealth Management of Raymond James	Dallas	TX	\$2-80M	\$1-16M	\$0	\$169M

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129	Elizabeth Engelmann	UBS Financial Services Inc.	Bloomington	MN	\$2-10M	\$1-6M	\$1M	\$236M
130	Marta Shen	Spring Street Financial of Raymond James	Atlanta	GA	\$600K-3M	\$250K-10M	\$1M	\$167M
131	Laura Cusenbary	Wells Fargo Advisors	Steamboat Springs	CO	\$3-7.5M	\$1-3M	\$500K	\$424M
132	Mary Sexton	Morgan Stanley Wealth Management	Washington	DC	\$2.5-30M	\$1-10M	\$500K	\$409M
133	Cassandra Smalley	Doyle Wealth Management	St. Petersburg	FL	\$2-5M	\$1-5M	\$0	\$825M
134	Suzanne Akian	Morgan Stanley Wealth Management	New York	NY	\$3-15M	\$3-11M	\$2M	\$1.2B
135	Kristen Scarpa Bissett	UBS Financial Services Inc.	West Palm Beach	FL	\$5-250M	\$25-150M	\$5M	\$1B
136	Kimberly Maez	Ameriprise Financial	Englewood	CO	\$748K-1.5M	\$250K-5M	\$0	\$421M
137	Lisa Katterhenry Howe	Wells Fargo Advisors	Troy	OH	\$500K-1M	\$500K	\$500K	\$543M
138	Heather Goodbody	Merrill Lynch — Private Banking & Investment Group	Pittsford	NY	\$100M	\$20M	\$5M	\$645M
139	Nelrae Ali	Wells Fargo Advisors	Jacksonville	FL	\$750K-10M	\$250K-10M	\$250K	\$149M
140	Heather Churchill	Morgan Stanley Wealth Management	Orlando	FL	\$1.5-7.5M	\$850K-5M	\$1M	\$594M
141	Shea Boulware-Creed	RBC Wealth Management	Peoria	AZ	\$2M	\$750K-17M	\$200K	\$230M
142	Alli McCartney	UBS Financial Services Inc.	New York	NY	\$15-100M	\$5-30M	\$5M	\$1B
143	Kelly Rindock	Raymond James & Associates	Center Valley	PA	\$1-7M	\$500K-5M	\$250K	\$139M
144	Stacy Francis	Francis Financial	New York	NY	\$1.2-9.8M	\$691K-7.2M	\$1M	\$185M
145	Lisa LaVecchia	Merrill Lynch Wealth Management	Florham Park	NJ	\$2M	\$1.5M	\$1M	\$345M
146	Andrea Pfeffer	Morgan Stanley Private Wealth Management	Aventura	FL	\$8-50M	\$1-10M	\$1M	\$565M
147	Sheri Billings	Merrill Lynch Wealth Management	Weston	FL	\$2-10M	\$2-15M	\$1M	\$436M
148	Laurie P. Barry	UBS Financial Services Inc.	Chicago	IL	\$1.5-3M	\$500K-1.5M	\$1M	\$160M
149	Catherine Fang	Morgan Stanley Wealth Management	Menlo Park	CA	\$5-50M	\$2-5M	\$1M	\$267M
150	Mary Helen Condon Moore	Merrill Lynch Wealth Management	Charleston	SC	\$3M	\$1M	\$500K	\$503M
151	Sandi Bragar	Aspiriant	San Francisco	CA	\$7-75M	\$9-100M	\$1.5M	\$12.2B
152	Mary L. Tomanek	Graystone Consulting	Deerfield	IL	\$10-60M	\$1-80M	\$10M	\$847M
153	Mindy Fishel	Alex.Brown/Raymond James	San Francisco	CA	\$7.5-15M	\$7-12M	\$1M	\$453M
154	Katerina Simonetti	UBS Financial Services Inc.	Philadelphia	PA	\$5-85M	\$2.5-55M	\$2M	\$423M
155	Claudine Callison-Siero	Morgan Stanley Wealth Management	Little Falls	NJ	\$2.5-20M	\$1-2.5M	\$1M	\$1.4B
156	Karen Keusayan	Wells Fargo Advisors	Los Angeles	CA	\$5-25M	\$5-20M	\$1M	\$1.2B
157	Winnie Sun	Sun Group Wealth Partners	Irvine	CA	\$500K-5M	\$500K-10M	\$500K	\$171M
158	Amy Smith	Ameriprise Financial	Novi	MI	\$600K-6M	\$400K-4M	\$250K	\$170M
159	Rita McCluskey	Merrill Lynch Wealth Management	Indianapolis	IN	\$2.5M	\$2M	\$1M	\$215M
160	Cassie Kosinski	Wells Fargo Advisors	Anchorage	AK	\$750K-2M	\$100K-2M	\$500K	\$144M
161	Jenny Santek	Morgan Stanley Wealth Management	Madison	WI	\$2-10M	\$500K-7M	\$500K	\$185M
162	Camille Gagliardi	Ameriprise Financial	West Hartford	CT	\$1-2M	\$550K-1.5M	\$500K	\$260M
163	Elizabeth Flavin Crawford	Sendero Wealth Management	San Antonio	TX	\$10-12M	\$10-15M	\$5M	\$3.7B
164	Jessica Kartzinel	UBS Financial Services Inc.	Henderson	NV	\$1-70M	\$500K-45M	\$1M	\$265M
165	Stacey Barrins	Morgan Stanley Wealth Management	Chicago	IL	\$2-15M	\$1-10M	\$1M	\$687M
166	Ileana Dominguez	UBS Financial Services Inc.	Henderson	NV	\$1-70M	\$500K-45M	\$1M	\$265M
167	Stephanie Smith Christiano	Merrill Lynch Wealth Management	Dover	DE	\$875K-4.5M	\$600K-3.5M	\$0	\$912M
168	Sara Pitcel	Morgan Stanley Wealth Management	Waukesha	WI	\$1-50M	\$500K-30M	\$1M	\$597M
169	Ashley H. Laubach	UBS Financial Services Inc.	Orlando	FL	\$750K-2M	\$750K-2M	\$250K	\$145M
170	Kimberly Evans	Wells Fargo Advisors	Atlanta	GA	\$4-20M	\$500K-4M	\$300K	\$195M
171	Kelly Bolton	Merrill Lynch Wealth Management	Germantown	TN	\$2.5M	\$1M	\$250K	\$630M
172	Carrie Turcotte	Wells Fargo Advisors	Chattanooga	TN	\$750K-2.5M	\$500K-2M	\$0	\$167M
173	Samantha Parker Hopkins	UBS Financial Services Inc.	Tampa	FL	\$2.3-4.5M	\$1-4.5M	\$1M	\$351M
174	Talya Bock	Merrill Lynch Wealth Management	Washington	DC	\$400K-10M	\$500K-4M	\$250K	\$658M
175	Cathie Coleman	Wells Fargo Advisors	Abilene	TX	\$1-2M	\$350K-5M	\$250K	\$230M
176	Joyce Streithorst	Frisch Financial Group	Melville	NY	\$1-10M	\$1-7M	\$1M	\$437M
177	Sharon Callender Snowden	UBS Financial Services Inc.	Houston	TX	\$1-10M	\$1-5M	\$1M	\$381M
178	Heather Barnett	Wells Fargo Advisors	Keokuk	IA	\$500K-5M	\$250K-2.5M	\$250K	\$200M
179	Michele McCallion	Merrill Lynch — Private Banking & Investment Group	Greenwich	CT	\$20-50M	\$10-50M	\$10M	\$368M
180	Melissa Mirabile	UBS Financial Services Inc.	Albany	NY	\$1-4M	\$850K-4M	\$1M	\$116M
181	Kimberlee Bouska	Addison Avenue Investment Services/Raymond James	Beaverton	OR	\$750K-1.5M	\$500K	\$200K	\$165M
182	Jennifer Dallas	Morgan Stanley Wealth Management	Barrington	IL	\$250K-15M	\$250K-15M	\$250K	\$151M
183	Catina Koenig	Baird	Edina	MN	\$1-15M	\$500K-10M	\$1M	\$140M
184	Kathleen Allison	Morgan Stanley Wealth Management	Rochester	MN	\$500K-15M	\$500K-3.1M	\$25K	\$321M
185	Lisa Angle	Merrill Lynch Wealth Management	Roanoke	VA	\$600K-1.5M	\$500K-3M	\$500K	\$307M
186	Leigh Anne Gage	UBS Financial Services Inc.	Cincinnati	OH	\$1.5-8M	\$1.5-8M	\$2M	\$1B
187	Kay Grasman	Morgan Stanley Wealth Management	New York	NY	\$10-50M	\$5-10M	\$2M	\$841M
188	Adrienne Yamaki	Morgan Stanley Wealth Management	San Francisco	CA	\$3-10M	\$3-10M	\$2M	\$109M
189	Lori Gervais	Baird	Mequon	WI	\$2-20M	\$2-7M	\$2M	\$363M
190	Kari Boxleitner	Wells Fargo Advisors	Loveland	CO	\$250K-3M	\$250K-3M	\$0	\$172M
191	Eva Marina Ovejero	Morgan Stanley Wealth Management	Miami	FL	\$30-90M	\$4-12M	\$2M	\$254M
192	Kim Luu-Tu	Ameriprise Financial	Vienna	VA	\$1-4M	\$750K-5M	\$500K	\$314M

2018 TOP WEALTH ADVISOR MOMS

Rank	Name	Company	City	State	Typical Net Worth	Typical Size of Household Accounts	Min. Account Size for New Business*	Team Assets**
193	Danielle Gilbert-Richard	Merrill Lynch Wealth Management	Burlington	VT	\$5M	\$1-5M	\$500K	\$413M
194	Jennifer Kraus	UBS Financial Services Inc.	New York	NY	\$5-20M	\$3-10M	\$1M	\$646M
195	Dawn Smith	Ameriprise Financial	Hopkinton	MA	\$1-5M	\$500K-3M	\$0	\$270M
196	Sandra Wang	Morgan Stanley Wealth Management	Palo Alto	CA	\$4-8M	\$1.5-6M	\$1M	\$642M
197	Elana Millanta	Wells Fargo Advisors	Greenwich	CT	\$5-20M	\$1-5M	\$1M	\$208M
198	Rebekah Faasau	Merrill Lynch Wealth Management	Boise	ID	\$1-10M	\$607K-15.8	\$800K	\$354M
199	Dawn Dupre	Morgan Stanley Wealth Management	Berwyn	PA	\$2M	\$1.2M	\$250K	\$340M
200	Mary Batcha	Merrill Lynch Wealth Management	Yardley	PA	\$1-8M	\$1-16M	\$1M	\$347M
201	Felicia Di Silvestro	Morgan Stanley Wealth Management	Chicago	IL	\$5-10M	\$3-7M	\$1M	\$313M
202	Miye Wire	MiyeWire	Reston	VA	\$400K-1M	\$100K-2M	\$0	\$140M
203	Fay DeBellis	Morgan Stanley Wealth Management	Minneapolis	MN	\$15M	\$2-10M	\$1M	\$289M
204	Michelle Mabry	Client 1st Advisory Group	Hattiesburg	MS	\$1-10M	\$1-3M	\$500K	\$195M
205	Janette Acton	Merrill Lynch Wealth Management	Oak Brook	IL	\$1-10M	\$1-10M	\$750K	\$335M
206	Sarah Man	Morgan Stanley Private Wealth Management	Westport	CT	\$1-7M	\$2-7M	\$1M	\$398M
207	Caryl-Lyn Mazullo	UBS Financial Services Inc.	Akron	OH	\$1-20M	\$500K-30M	\$500K	\$169M
208	Dana Margiotta Frellick	Morgan Stanley Wealth Management	Bloomfield Hills	MI	\$250K-5M	\$700K-2M	\$100K	\$101M
209	Kristin Bloom	UBS Financial Services Inc.	Westport	CT	\$2-5M	\$1-3M	\$1M	\$286M
210	Kimberly Melletat	Raymond James & Associates	Birmingham	MI	\$5-50M	\$1-6M	\$1M	\$358M
211	Sharon Starkey	Wells Fargo Advisors	Denver	CO	\$1-7M	\$250K-5M	\$250K	\$175M
212	Erika Puzik	Ameriprise Financial	Los Angeles	CA	\$2-10M	\$500K-5M	\$0	\$121M
213	Casey Kriedman	UBS Financial Services Inc.	New York	NY	\$10M-1B	\$2-50M	\$2M	\$314M
214	YC Lama	Morgan Stanley Wealth Management	Beverly Hills	CA	\$5-30M	\$1-7M	\$1M	\$223M
215	Brittany Hartnett	Merrill Lynch Wealth Management	Atlanta	GA	\$4-6M	\$500K-2M	\$500K	\$78.6B
216	Sarah Damsgaard	JP Morgan Securities	Chicago	IL	\$10M-5B	\$5-100M	\$5M	\$620M
217	Marilyn Keyser	Morgan Stanley Wealth Management	Purchase	NY	\$5-10M	\$2-5M	\$2M	\$1.7B
218	Rosalie Hunter	Merrill Lynch — Private Banking & Investment Group	Philadelphia	PA	\$25M	\$50M	\$5M	\$635M
219	Jen Haldemann	Baird	Milwaukee	WI	\$1-10M	\$2-8M	\$100K	\$532M
220	Reiko Evangelista	Wells Fargo Advisors	Burlingame	CA	\$1-5M	\$250K-3M	\$250K	\$214M
221	Stephanie Saunders	Morgan Stanley Wealth Management	Easton	MD	\$5-10M	\$1-3M	\$1M	\$1B
222	Ziyah Esbenshade	Ameriprise Financial	Rye Brook	NY	\$1.2-7M	\$250K-10M	\$500K	\$576M
223	Brooke McGeehan	RBC Wealth Management	New York	NY	\$750K-7M	\$200K-4M	\$0	\$125M
224	Beth Kraszewski	Raymond James Financial Services	Chicago	IL	\$1-4M	\$800K-31M	\$1M	\$365M
225	Carolyn Porter	Wells Fargo Advisors	Plymouth Meeting	PA	\$2-10M	\$250K-5M	\$250K	\$231M
226	Misty Jones	UBS Financial Services Inc.	Napa	CA	\$1-10M	\$500K-6M	\$500K	\$535M
227	Maureen Novak	Morgan Stanley Wealth Management	Syracuse	NY	\$2-20M	\$1-10M	\$1M	\$558M
228	Jenna Suleman	Wells Fargo Advisors	Miami	FL	\$10-100M	\$3-10M	\$5M	\$474M
229	Shelby Fink	Ameriprise Financial	Lexington	KY	\$750K-2M	\$500K-2M	\$300K	\$271M
230	Sally Oradei	Wells Fargo Advisors	Minneapolis	MN	\$1.5-4M	\$500K-3M	\$250K	\$156M
231	Hilary J. Doherty	RBC Wealth Management	Kirkland	WA	\$2-8M	\$1-5M	\$250K	\$288M
232	Shawna Farnol Bumpus	Morgan Stanley Wealth Management	Perrysburg	OH	\$250K-1.5M	\$500K-3.5M	\$100K	\$115M
233	Clare Filides-Schwemlein	Janney Montgomery Scott	Chillicothe	OH	\$350K-18.5M	\$250K-2M	\$0	\$426M
234	Rachel Cohen	Morgan Stanley Wealth Management	Plymouth Meeting	PA	\$2-20M	\$1-15M	\$1M	\$299M
235	Beth Zucker	Wells Fargo Advisors	Jenkintown	PA	\$750K-5M	\$750K-1M	\$500K	\$258M
236	Kate Salsman	Morgan Stanley Wealth Management	Lexington	KY	\$3.5-15M	\$1-5M	\$500K	\$240M
237	April Oliver	Ameriprise Financial	Charlotte	NC	\$500K-5M	\$200K-2M	\$0	\$201M
238	Laura Christofferson	Alden Capital Management/Raymond James	Bellevue	WA	\$1-5M	\$500K-5M	\$500K	\$231M
239	Melinda Brewer	Morgan Stanley Wealth Management	Oklahoma City	OK	\$2.5-10M	\$500K-5M	\$100K	\$720M
240	Katie Thompson	Merrill Lynch Wealth Management	Albuquerque	NM	\$2.5-7.5M	\$1.5-5M	\$400K	\$805M
241	Katie Rouff-Ward	Wells Fargo Advisors	New York	NY	\$500K-2M	\$300-500K	\$1M	\$330M
242	Galit Ben-Joseph	JP Morgan Securities	New York	NY	\$5-10M	\$3-5M	\$0	\$115M
243	Paula Dougherty	Ameriprise Financial	Springfield	MO	\$1.5-7M	\$500K-5M	\$250K	\$171M
244	Amanda Manske	Prime Financial Services	Wauwatosa	WI	\$500K-1M	\$500K	\$0	\$275M
245	Limei Yu	UBS Financial Services Inc.	Chicago	IL	\$1-50M	\$500K-25M	\$500K	\$803M
246	MaryAnn Pietromonaco	Morgan Stanley Wealth Management	Cincinnati	OH	\$2.5M	\$500K-1M	\$500K	\$237M
247	Samantha Price-Koontz	Merrill Lynch Wealth Management	Montvale	NJ	\$1-2.5M	\$100-500K	\$500K	\$123M
248	Courtney Lisecki	Morgan Stanley Wealth Management	New York	NY	\$2-15M	\$2-15M	\$500K	\$411M
249	Christina Schatz	Morgan Stanley Wealth Management	New York	NY	\$5-50M	\$5-25M	\$0	\$705M
250	Katie Coleman	Ameriprise Financial	Melville	NY	\$500K-3M	\$200K-1M	\$0	\$320M
251	Wendy Eddy	Wells Fargo Advisors	Long Beach	CA	\$1-20M	\$1-8M	\$0	\$118M
252	KT Thompson	UBS Financial Services Inc.	Troy	MI	\$1-5M	\$250K-2.5M	\$150K	\$89M
253	Alissa Hersch	Morgan Stanley Private Wealth Management	Seattle	WA	\$2-10M	\$1-10M	\$1M	\$1.2B
254	Linda Zimmerman	Ameriprise Financial	Minnetonka	MN	\$500K-5M	\$400K-4M	\$0	\$174M
255	Andrea James	Wells Fargo Advisors	Clive	IA	\$1-5M	\$500K-5M	\$500K	\$209M
256	Lisa Amster	Morgan Stanley Private Wealth Management	Los Angeles	CA	\$20-200M	\$10-100M	\$5M	\$1.1B

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257	Katie DeMarco	UBS Financial Services Inc.	New York	NY	\$2.5-10M	\$250K-1M	\$100K	\$196M
258	Andrea Riley Arnesen	Ameriprise Financial	Nashua	NH	\$350K-1.7M	\$200K-3M	\$100K	\$106M
259	Becky Bridgmon	Morgan Stanley Wealth Management	Memphis	TN	\$2-15M	\$750K-5M	\$250K	\$304M
260	Leslie Shenkler	UBS Financial Services Inc.	Princeton	NJ	\$500K-10M	\$250K-5M	\$250K	\$171M
261	Leanne Scull	Raymond James & Associates	Memphis	TN	\$500K-9.5M	\$500K-6M	\$0	\$170M
262	Barbara Virany	Morgan Stanley Wealth Management	Pittsburgh	PA	\$2-6M	\$20M	\$500K	\$212M
263	Gracelyn Root	Wells Fargo Advisors	Westlake Village	CA	\$1-5M	\$1-2.5M	\$1M	\$140M
264	Noel Brown	Morgan Stanley Wealth Management	Honolulu	HI	\$2-20M	\$2-20M	\$0	\$251M
265	Melissa Joy	Center for Financial Planning/Raymond James	Southfield	MI	\$500K-10M	\$350K-10M	\$3.5M	\$1B
266	Candace Gary	Ameriprise Financial	Baton Rouge	LA	\$500K-5M	\$100-750K	\$0	\$132M
267	Lis McNealey Spaine	Wells Fargo Advisors	Columbus	OH	\$1.2-10M	\$600K-5M	\$500K	\$131M
268	Natalie Barron	UBS Financial Services Inc.	Seal Beach	CA	\$750K-5M	\$500K-2.5M	\$500K	\$627M
269	Renee Hof-Lacey	Morgan Stanley Wealth Management	Birmingham	MI	\$500K-3M	\$500K-30M	\$500K	\$94M
270	Kelly P. Cutsforth	Wells Fargo Advisors	Rochester	MN	\$1.5-2.5M	\$1.5-3M	\$250K	\$86M
271	Tammy Escobar-Miller	Morgan Stanley Wealth Management	Scottsdale	AZ	\$1-3M	\$750K-2M	\$500K	\$176M
272	Karen Hepworth	Wells Fargo Advisors	McLean	VA	\$250K-5M	\$250K-5M	\$250K	\$106M
273	Sabina Sewillo	Morgan Stanley Wealth Management	Chicago	IL	\$1-6M	\$2-8M	\$1M	\$780M
274	Katie Solvesky	Merrill Lynch Wealth Management	Canfield	OH	\$3-35M	\$1-25M	\$3M	\$1.2B
275	Deana Calvelli	Lockton Investment Advisors	Blue Bell	PA	\$10-500M	\$450M	\$1M	\$60B
276	Cynthia Lee	Wells Fargo Advisors	Honolulu	HI	\$5-20M	\$2-8M	\$1M	\$130M
277	Dana Nightingale	Obermeyer Wood Investment Counsel	Denver	CO	\$2-10M	\$1-8M	\$1M	\$1.5B
278	Elizabeth Eckert	Morgan Stanley Wealth Management	Indianapolis	IN	\$1-5M	\$250K-2M	\$500K	\$185M
279	Kate Eiland	Wells Fargo Advisors	Fresno	CA	\$1-10M	\$500K-3M	\$250K	\$165M
280	Lauren Pearson	HighTower Advisors	Birmingham	AL	\$1-15M	\$500K-6M	\$0	\$1B
281	Jennifer Murray	Morgan Stanley Wealth Management	Santa Maria	CA	\$1-10M	\$400K-5M	\$250K	\$347M
282	Dana Macaluso	UBS Financial Services Inc.	New York	NY	\$2-15M	\$500K-5M	\$500K	\$736M
283	Megan Phillips	Wells Fargo Advisors	Gardnerville	NV	\$4M	\$600K	\$250K	\$255M
284	Courtneine Nein	Good Life Advisors	Wyomissing	PA	\$300K-3M	\$250K-1.5M	\$0	\$2B
285	Patricia Craddock	Morgan Stanley Wealth Management	Providence	RI	\$2.5-5M	\$250K-20M	\$500K	\$230M
286	Meghan Railey	Wells Fargo Advisors	San Francisco	CA	\$15-50M	\$5-10M	\$0	\$500M
287	Suzanne Schwester Sloan	UBS Financial Services Inc.	Mount Laurel	NJ	\$1.5-5M	\$500K-5M	\$250K	\$190M
288	Jennifer Shydler	Merrill Lynch Wealth Management	Las Vegas	NV	\$1-10M	\$500K-3M	\$1M	\$728M
289	Meg Prestigiacomio	Baird	Madison	WI	\$1-8M	\$1-7M	\$500K	\$181M
290	Kerri Connellan	Morgan Stanley Wealth Management	New York	NY	\$2-15M	\$500K-5M	\$2M	\$763M
291	Emily Bemberg	Merrill Lynch Wealth Management	Little Rock	AR	\$3.5-10M	\$1-8M	\$250K	\$144M
292	Avi Safai	JP Morgan Securities	White Plains	NY	\$3-20M	\$1-10M	\$1M	\$180M
293	Melissa Sanchez	Baird	Waukesha	WI	\$250K-13M	\$100K-6M	\$0	\$326M
294	Elena Kochman	Morgan Stanley Wealth Management	McLean	VA	\$750K-10M	\$1-5M	\$1M	\$674M
295	Laura Eliasof Jimenez	Merrill Lynch Wealth Management	White Plains	NY	\$2.5-7M	\$500K-35M	\$250K	\$480M
296	Noelle Smith	Innovative Financial Planning	Mahwah	NJ	\$500K-2M	\$250K-1M	\$0	\$190M
297	Michelle Kuzma Kempf	HighTower Advisors	Vienna	VA	\$5-12M	\$3-10M	\$1M	\$1.3B
298	Cierra Walding	Ameriprise Financial	Fort Dodge	IA	\$500K-3M	\$200K-1M	\$100K	\$573M
299	Ichen Le	Wells Fargo Advisors	Redlands	CA	\$1-7M	\$200K-2M	\$100K	\$76M
300	CJ Charlebois Melendy	Ameriprise Financial	Williston	VT	\$2-15M	\$500K-5M	\$250K	\$265M

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METHODOLOGY

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