

INDEX OF WEALTH MANAGERS

List compiled by Crescendo Business Services. Names in boldface also appear in the profiles that follow. Wealth Manager additional financial services:
BP=Business Planning; CG=Charitable Giving; EP=Estate Planning; FP=Financial Planning; IN=Insurance; IV=Investments; TS=Trust Services; TX=Taxation

INVESTMENTS

Dick Jacobson
Crowell Weedon & Company
CG, TS

Ari Kalan
Morgan Stanley Smith Barney

Sean Kennally
Morgan Stanley Smith Barney
EP, IN

Dennis Kotoff
Wells Fargo Advisors, LLC

Michael Kramer
Wells Fargo Advisors, LLC

Sean Kraus
Citizens Trust
BP, FP, TS Page 118

Matthew Kuhn
Harris Financial Advisors
EP, FP, TX

Greg Kushner
Lido Advisors
FP Page 119

Ben Lee
Wells Fargo Investments, LLC

Ronald Levenson
LPL Financial
FP

Brad Levin
Legacy Wealth Partners
EP, FP, TX

Max Lile
Morgan Stanley Smith Barney
EP, FP Page 119

Adriane Lowe
Mass Mutual
EP, FP, IN

Chris Luechtefeld
Morgan Stanley Smith Barney
EP, FP, TS Page 113

Richard Luechtefeld
Morgan Stanley Smith Barney
EP, FP, TS Page 113

Bruce Mandel
Oakwood Capital Management
EP, FP, TX

Jay Marshall
RBC Wealth Management
EP, FP, IN

James Mayorkas
Wells Fargo Advisors, LLC

Andrew McDonald
StockCross Financial

INVESTMENTS

Alan McQueen
Crowell Weedon & Company
EP

Russell Mohberg
Regatta Capital Group

Mike Moody
Dorsey Wright Money Management
FP

Richard Moran
Moran Kimura & Heising
FP Page 119

Todd Morgan
Bel Air Investment Advisors

Robert Newman
Morgan Stanley Smith Barney
FP, IN

Dana Pearl
Oppenheimer & Company
EP, FP

David Penn.
Southwest Securities
EP, FP Page 116

John Petrick
Perennial Financial Services
BP, EP, FP

Carmen Portnoy
Merrill Lynch
EP, FP, TS

Caleb "Spuds" Powell
Kayne Anderson Rudnick Wealth Management
EP, FP, TX

Andrew Price
Morgan Stanley Smith Barney
EP, FP

Eric Pritz
Signature Estate & Investment Advisors
BP, EP, FP

Larry Prutch
Merrill Lynch
FP, TS

Dennis Ray
Financial West Group
FP, IN, TX

Anthony Reed
Millennium Investment Services
EP, FP, TX Page 116

Ronald Reid
Morgan Stanley Smith Barney
EP, FP, IN

Diana Reyes
Edward Jones

INVESTMENTS

Sean Richardson
Morgan Stanley Smith Barney
FP Page 119

Patrick Russo
Wells Fargo Advisors, LLC

Alex Salcedo
UnionBanc Investment Services
EP, IN, TS Page 117

Eric Selter
Morton Capital Management
BP, EP, FP

Anthony Stella
Wells Fargo Advisors, LLC

Roger Stephens
Morgan Stanley Smith Barney
BP, FP

Todd A. Sterling
Thrivent Financial
EP, IN Page 117

Christine Stern
AFTRA-SAG Federal Credit Union/LPL Financial
EP, FP, IN

Jennifer Stewart
Morgan Stanley Smith Barney
EP, FP

Mark Sudol
The Sudol Group Wealth Management Specialists
EP, FP, IN

Paul Taghibagi
Signature Estate & Investment Advisors
BP, EP, FP

Tetsu Tanimoto
Merrill Lynch
BP, EP, FP

Arnetta Tolley
Edward Jones

Michael Tomlinson
Wells Fargo Advisors, LLC
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Christopher Van Horn
Wells Fargo Advisors, LLC

Freeman H. Welch
Wells Fargo Advisors, LLC

Brian Werdesheim
The Summa Group Of Oppenheimer
EP, FP

Jeffrey Werdesheim
The Summa Group Of Oppenheimer
EP, FP

INVESTMENTS

Joellen Wheeler
Wells Fargo Advisors, LLC

Alan Whitman
Morgan Stanley Smith Barney
EP, FP, IN

Iain Whyte
Merrill Lynch
BP, FP

Allen Yee
Guidant Planning
BP, EP, IN Page 114

John Zarchen
Wells Fargo Investments, LLC

TAXATION

Michael B. Allmon
Michael B. Allmon & Associates
BP, EP, FP

Randi Bach
Randi Bach, CPA
EP, FP Page 118

Gary Belz
White Nelson & Company

Dana Brenner
Brenner Berman & Associates
BP, EP

Lynell Chun
RBZ
BP, EP, FP Page 111

Lewis Cohen
Kaufman Rosenberg & Cohen, CPAs
BP, EP, IV

Yolanda Collins
Yolanda Collins, CPA
BP, CG, FP

Yoram Dor
Dor Freedman Dor & Dow
EP, FP, TS

Linda Dorfmont
Linda Dorfmont Certified Financial Planner
BP, EP

David Flamer
David R. Flamer
Accountancy Corporation
BP, EP

Steve Frankiel
Steve Frankiel, CPA
BP

Steven Freeman
Freeman & Associates
Accountancy
BP

TAXATION

Robert Gourley
R.D. Gourley & Company
BP

Barry Guterman
Barry Guterman Attorney at Law
EP

Rob Hagerty
Stevens Lyon & Hagerty, CPAs
FP

Scott Harmon
Harmon Wong & Im, CPAs
BP

Andrew Katz
Andrew L. Katz, CPA

Barry Mathews
Barry E. Mathews, CPA
BP, EP

Richard Matlock
Richard E. Matlock, CPA
TS

Sheila Morris
Sheila Morris, CPA
BP, TS

Derrick Rogers
D.A. Rogers & Associates
BP, EP, FP

Andrea Roschke
Roschke & Wall Business Advisors & CPAs
BP

Paul Scholz
Onisko & Scholz, CPA
EP

Charles Schwager
Barkin Perren Schwager & Dolan
BP, EP

John Tapp
Tapp Tapp & Ng
BP, EP, FP

Douglas Venturelli
Venturelli, Cary & Company
BP, EP

Jamen Wurm
Goehner Accountancy
BP, EP, TS

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