



Five Star Wealth Managers. Award winners listed by primary services and listed alphabetically by last name.

Frank Brady · Southwest Securities
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Leonard Brisco, Jr. · Merrill Lynch
Clint Camua · EP Wealth Advisors
Sean Casey · Crowell Weedon & Company
Christina Chanpong · Merrill Lynch
Craig Chiate · Merrill Lynch

Roger Conde · Pacific Retirement Advisors Page 13

Rosanne Costello · Charles Schwab
Peter Damascus · Merrill Lynch

Carl Davis · Ameriprise Financial Services, Inc. Page 11

Raffe Deirmanjian · Wells Fargo Advisors, LLC Page 11

Vince DiLeva · Signature Estate & Investment Advisors Page 7

Patrick Egan · Coordinated Wealth Management

Maziar Esmailbeigi · Morgan Stanley Smith Barney

Jose Fernandez · Citigold International

Rhonda Finby · Wells Fargo Advisors, LLC

Robert Floe · Floe Financial Partners

Gary Frazeur · Southwest Securities

Greg Garabedian · Garabedian Wealth Management Group

Steve Gonzalez · Edward Jones

Robert Greene · LPL Financial

Jennifer Hartman · Greenleaf Financial Group

Jeremy Heath · Morgan Stanley Smith Barney Page 9

Paul Heising · Moran Kimura & Heising

David Hennon · Wells Fargo Advisors, LLC

David Horvitz · Cheviot Value Management

Eric Johnson · Morgan Stanley Smith Barney

Ari Kalan · Morgan Stanley Smith Barney

Clyde Kendzierski · Financial Solutions Group

Sean Kennally · Morgan Stanley Smith Barney

Marianne Kolb · Merrill Lynch

Michael Kramer · Wells Fargo Advisors, LLC

Gregory Kushner · Lido Advisors

Benjamin Lee · Wells Fargo Advisors, LLC

Christine Lee · Charles Schwab

Ronald Levenson · LPL Financial
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Brad Levin · Legacy Wealth Partners

Gary Liska · Signature Estate & Investment Advisors Page 7

Cordelia Lo · Citi Personal Wealth Management Page 9

Chris Luechtefeld · Morgan Stanley Smith Barney

Richard Luechtefeld · Morgan Stanley Smith Barney

Bruce Mandel · Oakwood Capital Management

James Mayorkas · Wells Fargo Advisors, LLC

James McCabe · Wells Fargo Advisors, LLC

Alan McQueen · Crowell Weedon & Company

Mark Minichiello · Quincy Cass Associates

Russell Mohberg · Regatta Capital Group

Richard Moran · Moran Kimura & Heising

Jeffrey Moscarel · Moscarel Investment Advisory

Paul Okawa · Planned Asset Management

Roger Park · Ameriprise Financial Services, Inc.

David Penn · Southwest Securities
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Mark Pomerantz · Morgan Stanley Smith Barney

Caleb "Spuds" Powell · Kayne Anderson Rudnick Wealth Management

Eric Pritz · SEIA Page 7

Larry Prutch · Merrill Lynch

Simon Rawlinson · Simon Rawlinson

Tony Reed · Millennium Investment Services Page 12

John Reitnauer · Crowell Weedon & Company

Rob Royal · RBC Wealth Management

Patrick Russo · Wells Fargo Advisors, LLC

Nicole Ryan · Financial Network Investment Corporation

Eric Selter · Morton Capital Management

Alan Solursh · JP Morgan Securities

Anthony Stella · Morgan Stanley Smith Barney Page 10

Christine Stern · LPL Financial

Jennifer Stewart · Morgan Stanley Smith Barney

Mark Sudol · The Sudol Group - Wealth Management Specialists

Joseph Sulentor · Morgan Stanley Smith Barney

Roger Szendrey · Union Banc Investment Services

Benjamin Tadelis · Morgan Stanley Smith Barney

Marcus Tanimoto · Merrill Lynch

Ashana Thorman · Wescom Financial Services

Mark Thornburg · Wells Fargo Advisors, LLC

Freeman Welch · Wells Fargo Advisors, LLC

Brian Werdesheim · Oppenheimer & Company

Alan Whitman · Morgan Stanley Smith Barney

Michael Wilhite · Morgan Stanley Smith Barney

James Zeutzius · Wells Fargo Advisors, LLC Page 8

Taxation

Michael Allmon · Michael B. Allmon & Associates

Randi Bach · Randi Bach, CPA Page 13

Lynell Chun · RBZ Page 6

Yolanda Collins · Yolanda Collins, CPA

Yoram Dor · Dor Freedman Dor & Dow

Robert Gourley · R.D. Gourley

Sheila Morris · Sheila I. Morris, CPA

M. Debra Reno · M. Debra Reno, CPA

David Small · Kelly & Small, CPAs

Troy Yoshida · Troy Yoshida, CPA

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