

FT 100 Women Financial Advisers 2014

FT 100 Women Financial Advisers

Those who made the 2014 inaugural list. For methodology see ft.com/reports

Name	Company	City	Client segments served			
			Retail	HNW*	Ultra HNW**	Institutional
ARIZONA						
Burroughs, Christina	Miller Russell Associates	Phoenix		✓	✓	
CALIFORNIA						
Amendt, Elizabeth	Citi Private Bank	Costa Mesa			✓	
Belo, Laura D.	UBS Financial Services	San Francisco	✓	✓	✓	
Benedetti, Marie B.	Merrill Lynch Wealth Mgt	San Francisco		✓	✓	✓
Blodgett, Karen	Aspiriant	San Francisco	✓	✓	✓	
Chong, May C.	Merrill Lynch Wealth Mgt	Pasadena	✓	✓	✓	
Ellison, Jennifer	Bingham, Osborn & Scarborough LLC	Redwood City	✓	✓	✓	✓
Eusey, Shannon E.	Beacon Pointe Advisors	Newport Beach	✓	✓	✓	✓
Golden, Anne B.	First Republic Investment Mgt	San Francisco		✓		
Jorgensen, Debbie	Merrill Lynch Wealth Mgt	San Francisco		✓	✓	✓
Leong, Christine	J.P. Morgan Private Bank	San Francisco		✓	✓	
Littlefield, Janet K.	Atherton Lane Advisers, LLC	Menlo Park		✓	✓	✓
Micheli, Nikki	Aspiriant	Los Angeles		✓	✓	
Pence, Laila	LPL Financial	Newport Beach	✓	✓	✓	
Piepenkotter, Monica	Merrill Lynch Private Banking & Investment Group	La Jolla	✓	✓	✓	✓
Prunier, Danielle	Merrill Lynch Wealth Mgt	Los Angeles	✓	✓	✓	✓
Rosenau, Pamela	HighTower	Los Angeles	✓	✓		
Rothstein, Rebecca	Merrill Lynch Private Banking & Investment Group	Beverly Hills		✓	✓	
Sievers, Taryn A.	Morgan Stanley	Oakland	✓	✓	✓	✓
Ward, Laura	First Republic Investment Mgt	San Francisco		✓	✓	✓
Wetherby, Debra L.	Wetherby Asset Mgt	San Francisco		✓	✓	✓
Young, Cheryl L.	Morgan Stanley	Los Gatos		✓	✓	✓
COLORADO						
Corrado-Harrison, Melissa	Merrill Lynch Private Banking & Investment Group	Denver			✓	
Dominguez, Wendy J.	Innovest Portfolio Solutions, LLC	Denver		✓	✓	✓
CONNECTICUT						
Adamsen, Susan Nelson	J.P. Morgan Private Bank	Greenwich			✓	
Davis, Laura B.	J.P. Morgan Private Bank	Greenwich			✓	
Hanson, Dana	Relyea Zuckerberg Hanson	Stamford		✓	✓	
Kenworthy, Mary Mattson	UBS Private Wealth Mgt	Stamford		✓	✓	✓
Perry, Maureen S.	Citi Private Bank	Greenwich			✓	
DELAWARE						
Hewitt, Cynthia	Merrill Lynch Wealth Mgt	Wilmington	✓	✓	✓	✓
DISTRICT OF COLUMBIA						
Shaffer, Sheila S.	Janney Montgomery Scott LLC	Washington		✓	✓	
FLORIDA						
Adams-DiPiero, Kimberly	ProVise Mgt Group, LLC	Clearwater	✓	✓	✓	✓
Starner, Margaret C.	Starner Group of Raymond James	Coral Gables	✓	✓	✓	✓
Xenos, Faith Read	Singer Xenos Wealth Mgt	Coral Gables	✓	✓	✓	✓
GEORGIA						
Howard, Deborah	Merrill Lynch Wealth Mgt	Atlanta	✓	✓	✓	✓
Prigge, Brittain	Balentine	Atlanta		✓	✓	✓
ILLINOIS						
Kuhlman, Stacie B.	J.P. Morgan Private Bank	Chicago			✓	
Oberlander, Sharon F.	Merrill Lynch Wealth Mgt	Chicago	✓	✓		✓
Raihle, Maureen	Merrill Lynch Private Banking & Investment Group	Chicago		✓	✓	
Roeser, Kathleen	Morgan Stanley	Chicago	✓	✓	✓	✓
Stephans, Linda	Merrill Lynch Private Banking & Investment Group	Chicago		✓	✓	✓
Van Liew, Kristina	Merrill Lynch Private Banking & Investment Group	Chicago			✓	✓
KANSAS						
Stepp, Kathy	Stepp & Rothwell, Inc.	Overland Park	✓	✓		✓
MARYLAND						
Baum, Patricia P.	RBC Wealth Mgt	Annapolis			✓	✓
Etergino, Ann Marie	RBC Wealth Mgt	Chevy Chase	✓	✓	✓	✓
Wallace, Christine M.	Chevy Chase Trust	Bethesda	✓	✓	✓	
MASSACHUSETTS						
Brede, Debra K.	D.K. Brede Investment Mgt Company, Inc.	Needham	✓	✓	✓	✓
Dwyer, Kimberly A.	Atlantic Trust Private Wealth Mgt	Boston		✓	✓	✓
Fisher, Elizabeth P.	Atlantic Trust Private Wealth Mgt	Boston		✓		
Kaplan, Susan C.	LPL Financial	Newton Lower Falls		✓		
Maregni, Kelly	Federal Street Advisors	Boston	✓	✓	✓	✓
Silver, Jennifer K.	Redwood Investments, LLC	Newton		✓	✓	✓

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MICHIGAN						
Chen-Zhang, Lynn L.	Zhang Financial	Portage	✓	✓	✓	✓
Sorensen, Rebecca S.	UBS Financial Services	Birmingham	✓	✓	✓	
MINNESOTA						
Boyd, Christina K.	Merrill Lynch Wealth Mgt	Wayzata	✓	✓		
MISSOURI						
Compardo, Diane R.	The Compardo Team at Moneta Group	St. Louis		✓	✓	
NEW HAMPSHIRE						
Shilo, Claudia	Balentine Partners	Wolfeboro		✓	✓	
NEW JERSEY						
Deatherage, Mary	Morgan Stanley Private Wealth Mgt	Little Falls		✓	✓	✓
Hakim, Nina	UBS Financial Services	Westfield	✓	✓	✓	✓
NEW YORK						
Abouzied, Jasmine C.	J.P. Morgan Private Bank	New York			✓	
Altfest, Karen C.	Altfest Personal Wealth Mgt	New York	✓	✓	✓	
Chrin, Maria L.	Circle Wealth Mgt, LLC	New York		✓	✓	
Cooley, Nancy	Morgan Stanley Private Wealth Mgt	New York		✓	✓	✓
DeLorenzo, Lee	United Asset Strategies, Inc.	Garden City		✓	✓	
DeMetropolis, Alma	JPMorgan Private Bank	New York			✓	✓
Fuhrmann, Alexandra L.	Atlantic Trust Private Wealth Mgt	New York		✓	✓	✓
Hatchett, Kimberley A.	Morgan Stanley Private Wealth Mgt	New York		✓	✓	
Jacquet, Sharon H.	J.P. Morgan Private Bank	New York			✓	
Jameson, Cathy A.	Silvercrest Asset Mgt Group LLC	New York		✓	✓	✓
Linden, Josephine	Linden Global Strategies	New York	✓	✓	✓	✓
Liu, Ida	Citi Private Bank	New York			✓	
Moeder, Alyssa C.	Merrill Lynch Private Banking & Investment Group	New York		✓	✓	✓
Montaperto, Deborah D.	Morgan Stanley Private Wealth Mgt	New York		✓	✓	✓
Moore, Courtney	Merrill Lynch Private Banking & Investment Group	New York		✓		
Mouzakis, Georgia S.	Citi Private Bank	New York			✓	✓
Ozeri, Dalia	Morgan Stanley	New York	✓	✓	✓	
Raasch, Barbara J.	RCL Advisors, LLC	New York		✓		✓
Reich, Robin M.	Merrill Lynch Wealth Mgt	New York	✓	✓		
Skerl, Diana M.	UBS Financial Services	New York		✓	✓	
Sofronas, Susan W.	Geller & Company	New York			✓	✓
Trask, Jessica L.	Offit Capital	New York			✓	
Van Dusen, Lori	LVW Advisors	Pittsford		✓	✓	
NORTH CAROLINA						
Malone, Kathleen E.	Wells Fargo Advisors, LLC	Charlotte		✓	✓	✓
Miles, Pamela P.	Wells Fargo Advisors, LLC	North Wilkesboro		✓	✓	✓
OHIO						
Carleton, Christine	Truepoint Wealth Counsel	Cincinnati	✓	✓	✓	✓
Newell, Valerie L.	RiverPoint Capital Mgt	Cincinnati		✓	✓	✓
Ruhlin, Peggy M.	Budros, Ruhlin & Roe, Inc.	Columbus		✓	✓	✓
PENNSYLVANIA						
Brennan, Patricia C.	Key Financial, Inc.	West Chester		✓	✓	✓
TENNESSEE						
Venable, Phoebe J.	CapWealth Advisors	Franklin		✓	✓	
TEXAS						
Habich, Kristen K.	JPMorgan Private Bank	Houston			✓	
Heuer, Susan	Merrill Lynch Wealth Mgt	Houston		✓		
Hicks, Susan M.	J.P. Morgan Private Bank	Dallas			✓	✓
Lockwood, Elizabeth G.	UBS Financial Services	Houston	✓	✓	✓	
Wyatt, Jeanie	South Texas Money Mgt, Ltd.	San Antonio		✓	✓	✓
VIRGINIA						
Buie, Elissa	Yeske Buie	Vienna		✓	✓	✓
Emond, Christine M.	Emond, Berger and Associates / Ameriprise	Fairfax		✓	✓	
Salomon, Dalal Maria	Wells Fargo Advisors Financial Network, LLC	Richmond		✓	✓	
WASHINGTON						
Potter, Barbara A.	Laird Norton Wealth Mgt	Seattle		✓	✓	
Zevenbergen, Nancy Ann	Zevenbergen Capital Investments LLC	Seattle	✓	✓	✓	✓
WISCONSIN						
Quade, Marian S.	Madison Investment Advisors	Madison		✓	✓	✓

* High net worth (clients with \$1m-\$10m in investable assets) ** Ultra high net worth (clients with \$10m or more in investable assets)