Robb Report

Worth

WEALTH IN PERSPECTIVE

THE NATION'S 100 MOST EXCLUSIVE WEALTH ADVISORS

MAJOR LEAGUE LEGACY

THE ARIZONA DIAMONDBACKS' OWNER SCORES AN EMOTIONAL ROI

FRACTURED FAMILI

A LOOK AT THREE 100-YEAR PLAN

JANUARY 2004

Elaine E. Bedel, CFP®

Named One of the Nation's 100 Most Exclusive Wealth Advisors - Consistently since 1994!

100 Top Financial Advisors *(cont.)*

	FIRM, CITY	PHONE	FIRM ASSETS	LARGEST CLIENT NET WORTH	MEDIAN CLIENT NET WORTH WITH REAL ESTATE	MEAN CLIENT NET WORTH WITH REAL ESTATE
Georgia						
Franklin H. Butterfield, CFP, CPA, PFS, CFA	Homrich & Berg, Atlanta	404.264.1400	$725 million	$125 million	$4 million	$7.5 million
Perry Chesney, CFP, CLU, ChFC+	Merrill Lynch Wealth Management, Atlanta	770.390.7364	$350 million	$100 million	$5 million	$12 million
Chris Dardaman, CFP, CPA, PFS, CIMA	Polstra & Dardaman, Norcross	770.368.1700	$300 million	$80 million	$3 million	$5.8 million
Robert (Buzz) Law, CFP	Creative Financial Group, Atlanta	800.435.8526	$606 million	$95.5 million	$3.3 million	$8.9 million
Illinois						
Mark Balasa, CFP, CPA	Balasa Dinverno Foltz & Hoffman, Schaumburg	847.925.9400	$610 million	$28 million	$6 million	$4.2 million
Brent Brodeski, CFP, CPA, CFA, MBA	Savant Capital Management, Rockford	815.227.0300	$469 million	$34 million	$1.2 million	$1.5 million
Harvey Struthers	JP Morgan Private Bank, Chicago	312.541.3610	$259 billion	$400 million	$125+ million	$600 million
Bruce Weininger, CFP, CPA	Deloitte & Touche, Chicago	312.242.9986	$250 million	$2 billion	$14.5 million	$52 million
Steven B. Weinstein, CFP, CFA, JD, MBA	Altair Advisers, Chicago	312.429.3013	$640 million	$1 billion+	$10 mllion	$21 million
Indiana						
Elaine Bedel, CFP, MBA	Bedel Financial Consulting, Indianapolis	317.843.1358	$200 million	$100 million	$1.8 million	$2.5 million
Robin Hall, CFP, JD	STAR Wealth Management, Indianapolis	317.566.3100	$415 million	$40 million	$5 million	$6 million
Iowa						
Chad P. Tramp, CFP, CPA	RSM McGladrey, Des Moines	515.281.9262	$1 billion+	$40 million	$2.4 million	$4.6 million
Maryland						
Howard Weiss, ++	Bank of America, Baltimore	410.547.4771	$95 billion	$110 million	$98 million	$72 million
Massachusetts						
Beverly A. Buker, CFP	Citigroup Private Bank, Boston	617.330.8909	$800 million	Not available	$100 million	$500 million
Cynthia Delia Coddington, CFP, CPA, PFS	Coddington Financial Partners, Wellesley	781.431.8702	Not available	Not available	$12.5 million	$24 million
Alice Finn, CFP, JD	Ballentine, Finn & Co., Lincoln	781.259.8126	$2.5 billion	$200+ million	$30 million	$60 million
Glenn Frank, CFP, CPA, PFS, MBA	Tanager Financial Services, Waltham	781.893.8040	$2.1 billion	$437 million	$4.9 million	$6.1 million
Beth Gamel, CPA, PFS, MBA	Pillar Financial Advisors, Waltham	781.290.4900	$727 million	$135 million	$12.7 million	$24.2 million
Robert Glovsky, CFP, CLU, JD	Mintz Levin Financial Advisors, Boston	617.348.1802	$750 million	$80 million	$4 million	$7 million

NOTE ABOUT FEE STRUCTURE: FEE ONLY UNLESS OTHERWISE INDICATED KEY:
+ fee or commission; * fee and commission; ++ fee offset; & fee only for new clients;

CFP: Certified Financial Planner; CPA: Certified Public Accountant; PFS: Personal Financial Specialist;
CFA: Chartered Financial Analyst; CIMA: Certified Investment Management Analyst; ChFC: Chartered Financial Consultant
CLU: Chartered Life Underwriter; JD: Doctor of Law; MBA: Master of Business Administration; PhD: doctorate