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150 best financial advisers for doctors: Our exclusive list

Need a new economic roadmap for these difficult times? Here are some experts who can help you find your way.

By Leslie Kane
Senior Editor

For many a physician, the roller coaster market and uncertain economy have transformed financial planning from a low priority to an urgent concern. If you're among those seeking expert guidance, our third, updated, list of the best financial advisers for doctors should help you find it.

This year, we began the selection process by asking you, our readers, to recommend financial advisers you've found knowledgeable and insightful. Many of you responded, describing how an adviser had helped you turn around a sticky financial situation or had pointed you toward a sensible path.

We then invited your nominees to take part in our rigorous screening process. Next, we re-evaluated candidates from our last list (published in the Aug. 7, 2000 issue) and sought new recommendations from national and regional financial planning organizations.

Every candidate filled out an extensive questionnaire covering his or her credentials, educational background, experience, percentage of doctor clients, size of the firm, affiliations with medical organizations, and noteworthy professional achievement. To evaluate the depth and type of advice they give clients, we reviewed a sample plan from each individual. We also looked at each adviser's Form ADV, which is filed with the SEC and describes professional background and payment methods.

To whittle the field of qualified candidates, we favored those recommended by our readers, and nominees whose interests were more focused on the health care profession. We eliminated advisers who are paid strictly by commission, since we believe that diminishes your chances of getting unbiased advice. And to allow us to include as many choices as possible in each geographical area, we made the tough decision to include only one adviser per firm, even though many firms listed have several partners who might qualify for inclusion.

Many of the advisers we chose have specialized financial planning credentials. Here's what the initials mean: Certified Financial Planner (CFP) designates comprehensive financial planning expertise. Certified Public Accountant (CPA) indicates expertise in tax issues. Personal Financial Specialist (PFS) is used by CPAs who specialize in financial planning. Chartered Financial Analyst (CFA) designates someone who has passed rigorous exams on investments and portfolio management given by the Association for Investment Management and Research. Chartered Financial Consultant (ChFC) indicates a focus on general financial planning. And CLU (Chartered Life Underwriters) denotes someone who specializes in insurance.

Many advisers require that you invest a minimum amount with their firm if you want them to manage your investments, and we've listed those minimum requirements. However, almost all the advisers on our list will draw up a financial plan or consult with you for an hourly or flat fee. In addition, some of the minimum requirements are flexible, depending on your financial situation.

150 best financial advisers, by state

Alabama

Charles D. Haines Jr., MBA, CFP
Charles D. Haines
Birmingham
205-871-3334
charlie.haines@charlesdhaines.com
Minimum portfolio: $500,000

Robert A. Studin, JD, CFP, CPA/PFS, ChFC
First Financial Group
Birmingham
205-803-3333
rastudin@ffginc.net

Stewart H. Welch III, CFP
The Welch Group
Birmingham
205-879-5001; 800-709-7100
stewart@welchgroup.com
Minimum portfolio: $1 million

Arizona

John Bagley, CFP, CPA
Strategic Wealth Advisors

Scottsdale
480-998-1798
john@xpertadvice.com
Minimum portfolio: $300,000

Patricia F. Raskob, CFP
Raskob Kambourian Financial Advisors
Tucson
520-690-1999
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Arkansas

Fredrick E. Adkins III, MBA, CFP, ChFC
The Arkansas Financial Group
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California

John T. Blankinship Jr., CFP
Blankinship & Foster
Del Mar
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Minimum portfolio: $1 million

Norman M. Boone, CFP
Boone Financial Advisors
San Francisco
415-788-1952
nboone@booneadvisors.com
Minimum portfolio: $500,000

Carl J. Camp, CFP
Eclectic Associates
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714-738-0220
carl@eclecticassociates.com
Minimum portfolio: $150,000

James M. Casey
Physicians' Asset Management
Marina Del Rey
800-852-3284

casey@physassetmgmt.com
Minimum portfolio: $250,000

Thomas J. McFarland, CFP
The Darrow Company
Los Angeles
310-556-2220
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Minimum portfolio: $300,000
Also listed in MA

Jerry S. Mosher, CFP
Mosher & Ellis Financial Planning
Lafayette
925-284-9470
jerry.mosher@mosher-ellis.com
Minimum portfolio: $250,000

Irwin S. Rothenberg, CPA/PFS
Zenith Capital—Wealth Management Consultants
Santa Rosa
707-542-3600
irothenberg@wealthmc.com
Minimum: $500,000

Spencer D. Sherman, MBA, CFP
Sherman Financial
Sebastopol
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Also listed in PA

Paul R. Temby, CFP, CFA
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Minimum portfolio: $750,000

Bob Wacker, CFP
R.E. Wacker Associates
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Colorado

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David Forbes, CFP, CFA
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Colorado Springs
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Minimum portfolio: $500,000

Lawrence E. Howes, MBA, CFP
Sharkey, Howes & Javer
Denver 3
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James F. Williams, CFP, CPA
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Connecticut

Alan P. Weiss, CFP, CPA/PFS
Regent Retirement Planning
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Minimum portfolio: $1 million

Florida

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Deena B. Katz, CFP
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Robert Levitt, MBA, CFP, CFA
Levitt Capital Management
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Marc Singer, MBA, CFP
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Georgia

Wesley D. Bigler, MBA, CFP
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William G. Hammond, CFP
Hammond Investment Planning
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bhfp2001@yahoo.com
Minimum portfolio: $500,000

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Financial Vision Advisors
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Minimum portfolio: $250,000

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David Polstra, CFP, CPA/PFS
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Hawaii

F. Dennis DeStefano, CPA, CFP
DeStefano Wealth Management
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Harry G. Kasanow, CFP
Kasanow & Associates: Wealth Management
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Minimum portfolio: $500,000

Illinois

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Mark E. Balasa, CPA, CFP
Balasa Dinverno Foltz & Hoffman
Schaumburg
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Minimum portfolio: $750,000

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Successful Financial Solutions
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Minimum portfolio: $400,000
Also listed in NV

Gary N. Bowyer, MBA, CFP
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Minimum portfolio: $250,000

Ronald J. Paprocki, JD, CFP
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Indiana

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Minimum portfolio: $100,000

Iowa

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Minimum portfolio: $500,000

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Kentucky

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Massachusetts

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Minimum portfolio: $300,000

Mississippi

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New Hampshire

Stephen A. Brophy, CFP, CPA/PFS, CLU, ChFC, MSFP
Brophy Financial Advisory Group
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Minimum portfolio: $250,000

Brian Grodman, CFP, MBA, CLU, ChFC
Grodman Financial Group

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New Jersey

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Minimum portfolio: $250,000

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Harry Scheyer, CFP, CPA/PFS
Pinnacle Financial Advisors
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Eleanore K. Szymanski, CFP
EKS Associates
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Albert J. Zdenek Jr., CPA/PFS
Zdenek Financial Planning
Flemington
908-782-1600
info@zdenek.com
Minimum: $1 million

New Mexico

Irvin F. Diamond, CFP, CPA/PFS
REDW Stanley Financial Advisors
Albuquerque
505-998-3205
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New York

Lewis J. Altfest, MBA, PhD, CPA/PFS
L. J. Altfest & Co.
New York
212-406-0850; 888-525-8337
lja@altfest.com
Minimum portfolio: $500,000

Jay H. Freeberg, MBA, CFP, CPA
JRF Asset Advisors
Garden City, NY
516-622-0024
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Minimum portfolio: $100,000

David N. Kahn, CPA/ PFS
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david.n.kahn@aexp.com

Anthony J. Ogorek, CFP
Ogorek Wealth Management
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Minimum portfolio: $1 million

Ronald W. Rogé, CFP
R.W. Rogé & Co.
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Minimum portfolio: $1 million

Gary Schatsky, JD
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Ohio

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Ted K. Saneholtz, CFP, CPA/PFS, ChFC
Summit Financial Strategies
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John E. Sestina, CFP, ChFC
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Oklahoma

Doane F. Harrison, MBA, CPA/PFS
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Randy L. Thurman, CPA, CFP
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Oregon

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Minimum portfolio: $1 million

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Pennsylvania

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Minimum portfolio: $250,000

M. Jeff Metz, CFP
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Minimum portfolio: $1 million

Stanley L. Pollock, DMD, JD, CFP, ChFC
Professional Practice Planners
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Minimum portfolio: $100,000

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Rhode Island

Malcolm A. Makin, CFP
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South Carolina

Cheryl R. Holland, CFP
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Minimum portfolio: $200,000

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Tennessee

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Paul K. Fain III, CFP
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Martha Moore Hobson, MA, CFP

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Texas

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Minimum portfolio: $250,000

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Utah

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James E. Pearman Jr., CFP, CPA/PFS

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Ronald L. West, CFP
West Financial Services
McLean
703-847-2500; 800-445-1556
wfs@westfinancial.com
Minimum portfolio: $700,000

Washington

Richard M. Millar, MBA, CFP
Dempsey Financial Services
Olympia
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startigr@mail.tss.net

Gregory T. Stapp, CFP, CPA/PFS
Stapp Financial Planning
Olympia
360-754-8895
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Minimum portfolio: $100,000

Wisconsin

F. Michael Arnow, MBA, CFP, CPA
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Glendale
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William R. Casey, CFP, CLU, ChFC
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Minimum portfolio: $500,000

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Minimum portfolio: $150,000

Leslie Kane. 150 best financial advisers for doctors--our exclusive list. *Medical Economics* 2002;23:94.

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