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

Patricia F. Raskob, CFP
Raskob Kambourian Financial Advisors
Tucson
520-690-1999
patr@rkfin.com

Arkansas

Fredrick E. Adkins III, MBA, CFP, ChFC
The Arkansas Financial Group
Little Rock
501-376-9051
ricka@arfinancial.com

California

John T. Blankinship Jr., CFP
Blankinship & Foster
Del Mar
858-755-5166
blankinship@bfadvisers.com
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
Fullerton
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
tom@thedarrowcompany.com
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
707-829-6190
spencer@shermanfinancial.com
Minimum portfolio: $1 million
Also listed in PA

Paul R. Temby, CFP, CFA
Dowling & Yahnke
San Diego
858-509-9500
paul.temby@dyinc.com
Minimum portfolio: $750,000

Bob Wacker, CFP
R.E. Wacker Associates
San Luis Obispo
805-541-1308
bob@rewacker.com

Lewis M. Wallensky, CFP
Lewis M. Wallensky & Associates
Los Angeles
310-557-2007
lewisc.wallensky@natplan.com

Colorado

Craig E. Carnick, CFP
Carnick & Rainsberger
Colorado Springs
719-579-8000; 800-447-8181
craig@wealthadvisory.com

David Forbes, CFP, CFA
Petra Financial Advisors
Colorado Springs
719-636-9000
dave@petrafinancial.com
Minimum portfolio: $500,000

Lawrence E. Howes, MBA, CFP
Sharkey, Howes & Javer
Denver 3
303-639-5100
larry@shwj.com
Minimum portfolio: $100,000

James F. Williams, CFP, CPA
J. F. Williams Co.
Denver
303-753-4506
jfwco@qwest.net
Minimum portfolio: $250,000

Connecticut

Alan P. Weiss, CFP, CPA/PFS
Regent Retirement Planning
Woodbridge
800-443-3101
alan@regentretirement.com
Minimum portfolio: $1 million

Delaware

Alan Benson Brown, CFP
Dover Limited Financial Services
Delmarva Limited Financial Consultants  
Hockessin  
302-234-8300  
alan@delmarvaltd.com  

Judith W. Lau, CFP  
Lau & Associates  
Wilmington  
302-792-5955  
lau.ltd@verizon.net  
Minimum portfolio: $1 million

Florida

Richard Alter, CFP, ChFC  
Alter Retirement Planning  
Boca Raton  
561-394-6226; 800-449-2029  
ralter@bellsouth.net  
Minimum portfolio: $200,000

Deena B. Katz, CFP  
Evensky, Brown & Katz  
Coral Gables  
305-448-8882  
deenakatz@evensky.com  
Minimum portfolio: $1 million

Robert Levitt, MBA, CFP, CFA  
Levitt Capital Management  
Boca Raton  
561-893-9901  
rlevitt@ lcmadvisors.com  
Minimum portfolio: $1 million

Linda S. Lubitz, CFP  
The Lubitz Financial Group  
Miami  
305-670-4440  
lubitz@aol.com

Jay L. Shein, PhD, CFP  
Compass Financial Group  
Lighthouse Point  
954-946-8501  
drshein@gate.net  
Minimum portfolio: $500,000
Marc Singer, MBA, CFP
Singer Xenos Wealth Management
Coral Gables
305-443-0060
msinger@singerxenos.com
Minimum portfolio: $500,000

Benjamin A. Tobias, CFP, CPA/PFS
Tobias Financial Advisors
Plantation
954-424-1660
ben@tobiasfinancial.com
Minimum portfolio: $500,000

**Georgia**

Wesley D. Bigler, MBA, CFP
Financial Network
Atlanta
404-843-3100
wbigler@financialnetworkcorp.com
Minimum portfolio: $500,000

William G. Hammond, CFP
Hammond Investment Planning
Atlanta
770-226-5343
bhfp2001@yahoo.com
Minimum portfolio: $500,000

Elizabeth Jetton, CFP
Financial Vision Advisors
Atlanta
770-444-9180
ejetton@financialvisionadv.com
Minimum portfolio: $250,000

Robert W. "Buzz" Law, CFP
Creative Financial Group
Atlanta
770-913-9704
buzz@cfgltd.com

David Polstra, CFP, CPA/PFS
Polstra & Dardaman
Norcross
770-352-1700
770-368-1700
davidp@pdllc.com
Minimum portfolio: $1 million

**Hawaii**

F. Dennis DeStefano, CPA, CFP
DeStefano Wealth Management
Kihei, Maui
808-879-0454
advisor@dwm.biz
Minimum portfolio: $200,000

Harry G. Kasanow, CFP
Kasanow & Associates: Wealth Management
Honolulu
808-988-1311; 800-988-4469
harrykhi@hawaii.rr.com
Minimum portfolio: $500,000

**Illinois**

Curt A. Anderson, CFP
First Busey Securities
Champaign
217-365-4870
canderson@busey.com

Mark E. Balasa, CPA, CFP
Balasa Dinverno Foltz & Hoffman
Schaumburg
847-348-5000
mbalasa@bd-fh.com
Minimum portfolio: $750,000

Sidney A. Blum, CFP, ChFC, CPA/PFS
Successful Financial Solutions
Northbrook
847-480-1490
sblum@concert-financial.com
Minimum portfolio: $400,000
*Also listed in NV*

Gary N. Bowyer, MBA, CFP
Gary N. Bowyer & Associates
Park Ridge
847-700-5000
847-789-5000
gnbassoc@ais.net
Minimum portfolio: $250,000

Mary F. McGrath, CFP, CPA
Cozad Asset Management
Champaign
217-356-8363; 800-437-1686
mary@cozadassetmgmt.com
Minimum portfolio: $250,000

Ronald J. Paprocki, JD, CFP
Mediquis Asset Advisors
Chicago
312-419-3733; 800-883-8555
paprocki@mediqus.com
Minimum portfolio: $500,000

**Indiana**

Elaine E. Bedel, MBA, CFP
Bedel Financial Consulting
Indianapolis
317-843-1358; 888-843-1358
ebedel@bedelfinancial.com
Minimum portfolio: $500,000

Richard L. Bellmer, CFP, CLU
Deerfield Financial Advisors
Indianapolis
317-469-2455
rbellmer@iquest.net
info@deerfieldfa.com

Michael J. Chapman, CFP
Provident Capital Management
Carmel
317-705-1999
provident@pcminvestment.com
Minimum portfolio: $500,000

Jeff Roach
Lincoln Financial Advisors
Indianapolis
317-819-4144
jproach@lnc.com
Minimum portfolio: $500,000
Minimum portfolio: $100,000

**Iowa**

Jerry R. Foster, CFP  
Foster Group  
West Des Moines  
800-798-1012  
[Jerryf@fostergrp.com](mailto:Jerryf@fostergrp.com)  
Minimum portfolio: $500,000

Ronald F. Helle, CFP, CPA/PFS  
Honkamp Krueger & Co.  
Dubuque  
563-556-0123  
[Rhelle@honkamp.com](mailto:Rhelle@honkamp.com)

**Kansas**

Michael J. Searcy, CFP, ChFC  
Searcy Financial Services  
Overland Park  
913-814-3800  
[Mike@searcyfinancial.com](mailto:Mike@searcyfinancial.com)  
Minimum portfolio: $500,000

Kathleen Stepp, CFP, CPA/PFS  
Stepp & Rothwell  
Overland Park  
913-649-3311  
[Kathy@steppandrothwell.com](mailto:Kathy@steppandrothwell.com)  
Minimum portfolio: $1 million

**Kentucky**

Dean M. Donohue, MBA, CFP  
American Express Financial Advisors  
Louisville  
502-412-4050; 888-345-1229  
[Dean.m.donohue@aexp.com](mailto:Dean.m.donohue@aexp.com)

D. Scott Neal, MBA, CFP, CPA/PFS  
D. Scott Neal  
Lexington  
859-254-3036  
[Scott Neal](mailto:Scott Neal)
Louisiana

Diana DeCharles, MBA, CFP
SunAmerica Securities
Shreveport
318-221-7526
ddecharles@hotmail.com
Minimum portfolio: $100,000

John Hixson, CFP
Financial Management Professionals
Lake Charles
337-433-4334
john@fmprofessionals.com

T. Craig Lewis III, CFP, CPA
Lewis Financial Group
Shreveport
318-861-7200
tclewis@sport.rr.com

Robert J. Reed, CFP
Personal Financial Advisors
Covington
985-898-0450
rreedcfp@bellsouth.net
Minimum portfolio: $50,000

Maryland

Marvin R. Burt, CFP
Burt Associates
Rockville
301-770-9880
mburt@burtassociates.com
Minimum portfolio: $500,000

Peg Downey, CFP
Money Plans
Silver Spring
301-589-4250
pdowney740@aol.com
Minimum portfolio: $300,000

Thomas S. O'Connor, CFP
Thomas S. Greeves, CFP
Windsor Asset Management
Bethesda
301-664-8460
feeonlyinvestor@aol.com
Minimum portfolio: $250,000

Trevor C. Lewis Jr., CFP
PSA Financial Center & Affiliates
Lutherville
410-821-7766; 800-677-7887
chip@psafinancial.com

Mary A. Malgoire, CFP, MBA
The Family Firm
Bethesda
301-656-3999
staff@familyfirm.com
Minimum portfolio: $750,000

Paul E. Malone, MBA
Merrill Lynch
Rockville
301-230-6652; 800-723-0730
paul.malone@ml.com
Minimum portfolio: $500,000

Christopher P. Parr, MBA, CFP
Financial Advantage
Columbia
410-715-9200
cparr@financialadvantageinc.com
Minimum portfolio: $700,000

Massachusetts

Michael L. Brown, JD, CPA
Brown & Brown Financial
Boston
617-227-4645
mbrown@browncpas.com
Minimum portfolio: $500,000

Gayle Buff, MBA, CFP, CFA
Buff Capital Management
Newton
617-641-2377
l@buffcapital
Minimum portfolio: $500,000

Herbert K. Daroff, CFP, JD
Baystate Financial Services
Boston
617-585-4502
hdaroff@baystatefinancial.com

Daniel J. Galli, CFP
Boston 128 Companies
Rockland
781-878-2322
dangalli@mindspring.com

Susan C. Kaplan, MBA, CFP
Kaplan Financial Services
Newton
617-527-1557
kaplanfin@aol.com
Minimum portfolio: $1 million

Thomas J. McFarland, CFP
The Darrow Company
Concord
978-369-5144
See full listing in CA

Michigan

Marilyn M. Gunther, CFP
Center for Financial Planning
Southfield
248-948-7900
mgunther@rjfs.com
Minimum portfolio: $500,000

Earl L. Romans, CPA
Earl L. Romans & Co.
Southfield
248-353-4990
earl@earlromans.com

Minnesota

Todd D. Bramson, CFP, ChFC, CLU
North Star Planning Group
North Star Resource Group
Minneapolis
612-617-6000; 888-655-8092 ext. 218
todd.bramson@northstarfinancial.com

Joel S. Greenwald, MD, CFP
Raymond James Financial Services
Edina
952-922-0995
joel.greenwald@raymondjames.com

Stephen E. Kairies, CLU, ChFC
Access Financial Services
Minneapolis
952-885-2734
steve@accessfinsvcs.com
Minimum portfolio: $150,000

Robert J. Klosterman, CFP, CLU, CHFC
White Oaks Wealth Advisors
Minneapolis 55426
952-542-8128
Also: St. Paul
651-223-2848 ext. 225
bobk@whiteoakswealth.com
Minimum portfolio: $500,000

Ross Levin, CFP
Accredited Investors
Edina
952-841-2222
ross@accredited.com
Minimum portfolio: $1 million

Robert A. Steffen, CFP
Robert Steffen & Associates
Bloomington
952-884-7700
bob@robertsteffen.com
Minimum portfolio: $300,000

Mississippi

Tim C. Medley, CFP
Medley & Brown
Ridgeland
601-982-4123

Missouri

M. Eileen Dorsey, MBA, CFP
Money Consultants
St. Louis
314-963-9813
medorsey@swbell.net

Emmett F. Owenby III, MBA
Wachovia Securities
St. Louis
314-889-9102; 800-752-1255
eowenby@wachoviasec.com
Minimum portfolio: $250,000

Nebraska

J.A. Abels, CFP
Family Estate Planning
Papillion
402-331-1429
j@familyestateplanning.com
Minimum portfolio: $100,000

Nevada

Sidney A. Blum, CFP, ChFC, CPA/PFS
Successful Financial Solutions
Las Vegas
800-417-1141
See full listing in IL

New Hampshire

Stephen A. Brophy, CFP, CPA/PFS, CLU, ChFC, MSFP
Brophy Financial Advisory Group
Bedford
603-668-2303
sbrophy@sbrophy.com
Minimum portfolio: $250,000

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

See full listing in IL
New Jersey

Steven B. Enright
Enright, Mollin, Cascio & Ramusevic
Old Tappan
201-666-5113
sefa@aol.com
Minimum: $1 million

Patricia S. Feeney, CFP, CFA
Breton Financial
Medford
609-654-1212
psfcfa@aol.com

Karl H. Graf, CFP, CPA/PFS
Graf Financial Advisors
Wayne
973-633-9199
kgraf@gfaplan.com
Minimum portfolio: $250,000

Robert P. Hanlon Jr., CFP
RPH Financial Services
Morristown
800-676-0064
bob@rphfinancial.com
Minimum portfolio: $500,000
Also listed in PA

Ram Kolluri, CFP
GlobalValue Investors
Princeton
800-637-9955; 609-452-2929
rkolluri@globalvalue.com
Minimum portfolio: $500,000

Harry Scheyer, CFP, CPA/PFS
Pinnacle Financial Advisors
Marlton
800-504-5040 ext. 223
harrys@pfacentral.com
Minimum portfolio: $1 million

El K Ski CFP
Eleanore K. Szymanski, CFP  
EKS Associates  
Princeton  
609-921-1016  
eksassoc@erols.com

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  
idiamond@redw.com

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  
free@jrlc.com  
Minimum portfolio: $100,000

David N. Kahn, CPA/ PFS  
American Express Tax & Business Services  
New York  
212-372-1303  
david.n.kahn@aexp.com

Anthony J. Ogorek, CFP  
Ogorek Wealth Management  
Williamsville  
716-626-5000
716-626-5000
prosper@ogorek.com
Minimum portfolio: $1 million

Ronald W. Rogé, CFP
R.W. Rogé & Co.
Bohemia
631-218-0077
info@rwroge.com
Minimum portfolio: $1 million

Gary Schatsky, JD
IFC Personal Money Managers
New York 10107
212-721-8713
Also: Albany
518-438-6566
gary@objectiveadvice.com

North Carolina

Giles K. Almond, CFP, CPA/PFS
Matrix Wealth Advisors
Charlotte
704-358-3322; 800-493-3323
galmond@matrixwealth.com

William Barton Boyer, CFP
Parsec Financial
Asheville
828-255-0271; 888-877-1012
bboyer@parsecfinancial.com
Minimum portfolio: $250,000

Kenneth B. Frenke, CFP
Kenneth Frenke & Co.
Arden
828-654-9343
kenfrenke@frenke.com

Peter H. Langer, CFP
Langer Wealth Management
Wilmington
910-256-6521
peter@langerwealth.com
Minimum portfolio: $500,000
Ohio

Michael J. Chasnoff, CFP
ACS Financial Advisors
Cincinnati
513-792-6648
mike@acsadvisors.com

Jason M. O'Dell
The O'Dell Group
Cincinnati
513-791-7525
jodell@one.net

Peggy M. Ruhlin, CFP, CPA/PFS
Budros & Ruhlin
Columbus
614-481-6900
pruhlin@budrosandruhlin.com
Minimum portfolio: $500,000

Ted K. Saneholtz, CFP, CPA/PFS, ChFC
Summit Financial Strategies
Columbus
614-885-1115
ted@summitfin.com
Minimum portfolio: $300,000

John E. Sestina, CFP, ChFC
John E. Sestina and Co.
Columbus
614-326-3077
jsestina@sestina.com
Minimum portfolio: $100,000

Oklahoma

Doane F. Harrison, MBA, CPA/PFS
Harrison Financial Services
Norman
405-329-3110; 800-522-3441
dharrison@harrisonassociatespc.com
Minimum portfolio: $250,000

Jana Shoulders, CPA
Adams Hall Investment Management

Tulsa
918-665-2446
jana@adamshall.com
Minimum portfolio: $1 million

Randy L. Thurman, CPA, CFP
Retirement Investment Advisors
Oklahoma City
405-842-3443; 800-725-4530
moneymng@aol.com
Minimum portfolio: $1 million

Oregon

Marilyn R. Bergen, CFP
CMC Advisers
Portland
503-227-5284
marilynb@cmcinvest.com
Minimum portfolio: $1 million

W. Ben Utley, MS, CFP
Utley & Associates
Eugene
888-465-0899
prosper@utleyassociates.com

Pennsylvania

Roy T. Diliberto, CFP, ChFC
RTD Financial Advisors
Philadelphia
215-557-3800
roy@rtdfinancial.com

Robert P. Hanlon Jr., CFP
RPH Financial Services
Sciota
570-992-1675
See full listing in NJ

James D. Hohman, CFP
Allegheny Financial Group
Pittsburgh
412-367-3880
jhohman@alleghenyfinancial.com
Minimum portfolio: $250,000
Minimum portfolio: $250,000

M. Jeff Metz, CFP
Pinnacle Financial Advisors
Narberth
800-504-5040 ext. 224
jeffm@pfacentral.com
Minimum portfolio: $1 million

Stanley L. Pollock, DMD, JD, CFP, ChFC
Professional Practice Planners
McKeesport
412-673-3144
stanpoll@aol.com
Minimum portfolio: $100,000

Robert E. Segal, MBA, CFP, CLU
Capital Financial Planning
York
717-747-9001; 877-747-9001; 410-486-2093
robert.segal@lpl.com

Spencer D. Sherman, MBA, CFP
Sherman Financial
Philadelphia
215-656-4280
See full listing in CA

Louis P. Stanasolovich, CFP
Legend Financial Advisors
Pittsburgh
412-635-9210
legend@legend-financial.com
Minimum portfolio: $1 million

Rhode Island

Malcolm A. Makin, CFP
Professional Planning Group
Westerly
401-596-2800
profplan@aol.com
Minimum portfolio: $100,000

South Carolina
Cheryl R. Holland, CFP  
Abacus Planning Group  
Columbia  
803-933-0054  
staff@abacusplanninggroup.com

William C. Prewitt, CFP, MS  
William C. Prewitt  
Charleston  
843-722-3331  
wmcprewitt@cs.com  
Minimum portfolio: $200,000

James E. Wilson, CFP  
J.E. Wilson Advisors  
Columbia  
803-799-9203  
mjekwilson.com

Tennessee

Lori A. Dodson, MBA, CFP, CPA/PFS  
Lori A. Dodson and Associates  
Nashville  
615-242-3808  
lori@loridodson.com

Paul K. Fain III, CFP  
Asset Planning  
Knoxville  
865-690-1231  
mailto:pkf@assetplanningcorp.com  
Minimum portfolio: $250,000

Michael Goldston  
Cambridge Equity Advisors  
Brentwood  
615-371-9002; 800-426-1391  
mgold35@yahoo.com

Richard K. Hammel, CFP  
Hammel Financial Advisory Group  
Brentwood  
615-371-5222  
richard@hammelfinancial.com

Martha Moore Hobson, MA, CFP  
Hb Yd F i il G
Hobson Yoder Financial Group
Oak Ridge
865-481-0045
mmhobson@hobsonyoder.com
Minimum portfolio: $100,000

William B. Howard Jr., CFP, ChFC
William Howard & Co. Financial Advisors
Memphis
901-761-5068
whoward@whcfa.com
Minimum portfolio: $500,000

Texas

Janet Briaud, CFP
Briaud Financial Planning
Bryan
979-260-9771
bfp@briaud.com
Minimum portfolio: $500,000

David H. Diesslin, MBA, CFP
Diesslin & Associates
Fort Worth
817-332-6122

Steven A. Estrin, MBA
The Financial Advisory Group
Houston
713-627-7660
sestrin@finadvisors.com
Minimum portfolio: $1 million

Richard R. Lee Jr., MBA, CFP, CFA
Lee Financial
Dallas
972-960-1001
Minimum portfolio: $1 million

William Matthews, CFP
Matthews Financial Services
Dallas
972-620-1822
mailto:bill@mattfin.com
Minimum portfolio: $250,000
John Henry McDonald, CFP
Austin Asset Management
Austin
512-453-6622
mailto:johnhenry@austinassetmanagement.com
Minimum portfolio: $250,000

Dexter Ward, CPA/PFS, CFP
Dexter Ward & Associates
Denison
800-453-3995
dexter@dexterward.com
Minimum portfolio: $100,000

E.W. "Woody" Young, CFP
Quest Capital Management
Dallas
214-691-6090
mailto:eyoung@raymondjames.com

Utah

John Bird, MBA, CFP, CFA
Albion Financial Group
Salt Lake City
801-487-3700
jbird@albionfinancial.com
Minimum portfolio: $500,000

Kent L. Wilson, CFP, CPA
Wilson Financial Advisors
Salt Lake City
801-355-5210
klw@utah-inter.net
Minimum portfolio: $100,000

Virginia

Joseph A. D'Orazio, JD, CFP, CPA
Rembert, D'Orazio & Fox
Falls Church
703-821-6655
jad@rdfadvisors.com
Minimum portfolio: $500,000

James E. Pearman Jr., CFP, CPA/PFS
For Cal & Financial Planning
Fee-Only Financial Planning
Roanoke
540-342-7102
fofpjames@cs.com

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
360-352-9560
startigr@mail.tss.net

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

Wisconsin

F. Michael Arnow, MBA, CFP, CPA
Arnow & Associates
Glendale
414-964-4000
mike@arnow.com

William R. Casey, CFP, CLU, ChFC
Access Investment Advisors
Manitowoc
920-683-9901; 888-426-8426
wcasey@access-advisors.com
Minimum portfolio: $500,000

Michele A. Cody, CFP
CRB Financial Services
Racine
262-884-6168
Leslie Kane. 150 best financial advisers for doctors--our exclusive list. Medical Economics 2002;23:94.

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