


























BARRON'S Top advisers in Virginia

'10 Rank	'09 Rank	Name	Firm	Location	CUSTOMERS						Total assets (\$mil)	Typical account (\$mil)	Typical net worth (\$mil)
					Individuals (Up to \$1mil)	High net worth (\$1-10 mil)	Ultra-high net worth (\$10 mil+)	Foundations	Endowments	Institutional			
1	3	Ric Edelman 	Edelman Financial Services	Fairfax	•	•					\$4,600	\$0.38	\$0.75-1
2	2	Joseph Montgomery 	Wells Fargo Advisors	Williamsburg	•	•	•	•	•	•	14,703	3-12	5-30
3	1	Randy Beeman 	Robert W. Baird	Reston	•	•	•				1,702	2.5-5	3.5-7.5
4	23	Stephan Cassaday 	Cassaday & Co. Inc.	McLean	•	•					800	1	1.2
5	N	John Sheehan 	Merrill Lynch	Reston	•	•	•	•	•	•	1,200	20	40
6	6	W. Jeffrey Carlton 	UBS Financial Services	Vienna	•	•	•	•	•	•	850	5	10-15
7	5	David Speck 	Wells Fargo Advisors	Alexandria	•	•		•	•	•	750	1.5	2-3
8	11	Robert Olcott 	WFA Financial Network	McLean		•	•	•	•	•	941	15-30	10+
9	N	Douglas Stewart 	Cary Street Partners	Fredericksburg	•	•	•	•		•	650	3	5
10	4	Dalal Salomon 	Salomon & Ludwin LLC (WFA Financial Network)	Richmond	•	•					453	1-5	3-10
11	25	Jeff LeClair 	Wells Fargo Advisors	McLean	•	•	•	•	•	•	990	2-10+	5-20+
12	14	James Cox 	LPL Financial Services	Colonial Heights	•						384	0.55	0.95
13	N	Frank Shull IV 	Lara Shull & May	Falls Church	•	•	•				700	8	6
14	N	Russell Cesari 	Northwest Financial	Herndon	•	•					275	0.1-2	0.5-3
15	10	Lee Corey 	Morgan Stanley Smith Barney	Alexandria	•	•	•	•		•	566	2-15	3-15
16	N	Brett Hayes 	WFA Financial Network	Richmond	•	•	•			•	360	2-5	3-10
17	N	G. Carl Mahler Jr. 	Pinnacle Group (affiliated with Raymond James)	Midlothian	•	•	•	•			200	0.8	0.8-10
18	N	Neil Goetzman 	Merrill Lynch	Alexandria	•	•	•	•	•	•	412	2	5
19	N	Kent Cox 	Morgan Stanley Smith Barney	Richmond	•	•	•		•	•	834	5	10
20	15	Kelly Campbell 	Campbell Wealth Management	Fairfax		•	•				280	2	3-5
21	21	Brenda Blisk 	Blisk Financial Group of Spire Investment Partners	McLean	•	•	•				275	1	2.5
22	N	Jay Headley 	Merrill Lynch	Richmond	•	•	•				400	1	3
23	13	Greg Popera 	Merrill Lynch	Vienna		•	•				532	20	25
24	N	Jeffrey Grinspoon 	Morgan Stanley Smith Barney	Vienna	•	•	•	•			750	2.5-5	3.5-7
25	N	John Verfurth 	Morgan Stanley Smith Barney	Vienna	•	•	•	•			750	2.5-5	3.5-7