

SHOOK top wealth advisers in Virginia

The following ranking of financial advisers was compiled by Florida-based SHOOK Research LLC, which also prepares a series of state by state and national lists for Forbes.

Rank	Name	Company	City	Typical client net worth	Minimum account size for new business ¹
1	Paul Pagnato	PagnatoKarp	Reston	\$20M	\$10M
2	Joe Montgomery	Wells Fargo Advisors	Williamsburg	5-15M	5M
3	Jeff Grinspoon	HighTower Advisors	Vienna	5-12M	1M
4	Gregory Smith	Baird	Reston	1-7M	500K
5	Simon Hamilton	Baird	Reston	1-7M	500K
6	Ryan Spowls	Wells Fargo Advisors	Alexandria	2-25M	1M
7	Tristan Caudron	Caudron Megary Blackburn Wealth Management	Alexandria	3-5M	1M
8	Barry Glassman	Glassman Wealth Services	Vienna	5-15M	2M
9	Stephan Cassaday	Cassaday & Company	McLean	2-15M	1M
10	James Bogart	Bogart Wealth	McLean	1-30M	1M
11	Robert Reich	Wells Fargo Advisors	McLean	3.5-50M	1M
12	Susan Kim	Ameriprise Financial Services	Vienna	1.5-12M	0
13	Neil Goetzman	Merrill Lynch Wealth Management	Alexandria	4-40M	1M
14	John Gill	BB&T Scott & Stringfellow	Virginia Beach	2.5-20M	1M
15	Justin Harris	Cassaday & Company	McLean	2-17M	1M
16	Allan Strange	Janney Montgomery Scott	Richmond	3-5M	0
17	Christopher Krell	Cassaday & Company	McLean	2-15M	1M
18	Bob Parr	Morgan Stanley Private Wealth Management	McLean	5-50M	2M
19	Jamie Cox	Harris Financial Group/LPL	Richmond	800K-7.5M	0
20	Aashish Matani	Merrill Lynch Wealth Management	Norfolk	2.5-35M	1M
21	Brett Hayes	Hayes Nystrom Sarrett Wealth Management Group	Richmond	1-10M	500K
22	Christopher MacNamara	Merrill Lynch Wealth Management	Vienna	1-10M	250K
23	Stephen Park	UBS Financial Services	Vienna	3-20M	3M
24	Weston Burnett	OptiFour Integrated Wealth Management	McLean	2-3M	700K
25	Tim Mullins	Wells Fargo Advisors	Richmond	3-12M	1M
26	Hanane Lemlih	Wells Fargo Advisors	McLean	8-75M	2M
27	Jeff LeClair	Wells Fargo Advisors	McLean	8-75M	2M
28	Robert Bradshaw	Merrill Lynch Wealth Management	Norfolk	250K	1M
29	Chris Aime	Baird	Reston	1-5M	250K
30	Brian Ford	RBC Wealth Management	Richmond	1.5-15M	1M
31	Mark Leonard	Morgan Stanley Wealth Management	McLean	5-10M	2M
32	Marc Cram	Morgan Stanley Wealth Management	Richmond	500K-5M	0
33	Carl Mahler Jr.	The Pinnacle Group/Raymond James	Midlothian	2-5M	500K
34	Greg Popera	Merrill Private Wealth Management	Tysons	30-50M	10M
35	Patrick Larkin III	Wells Fargo Advisors	Leesburg	1.5-15M	1M
36	Jeff Eveland	Merrill Lynch Wealth Management	Leesburg	2M	500K
37	Daniel G. Kleinschuster	UBS Financial Services	Richmond	2.5-7M	100K
38	Billy Barnes	Wells Fargo Advisors	Williamsburg	1-5M	250K
39	Wanda Austin	Morgan Stanley Wealth Management	Newport News	1.5-6M	0
40	Lee Corey	Morgan Stanley Wealth Management	Alexandria	5-25M	250K
41	Scott Haley	Raymond James Financial Services	Gloucester	750K-7M	500K
42	Kim Luu-Tu	Ameriprise Financial Services	Vienna	500K-15M	500K
43	Gregory Watts	Morgan Stanley Wealth Management	Virginia Beach	2-3M	500K
44	Christopher Young	Cassaday & Company	McLean	2-7M	1M
45	Ron Graft	Wells Fargo Advisors	McLean	3-8M	1M
46	Pat Faulkner	Towne Wealth Management/Raymond James	Williamsburg	4.7-11M	1M
47	Sarah Cammisso	Merrill Lynch Wealth Management	Vienna	2-5M	500K
48	David Earl	Merrill Lynch Wealth Management	Norfolk	1-15M	1M
49	David Armstrong	Monument Wealth Management	Alexandria	5-30M	1M
50	Dean Catino	Monument Wealth Management	Alexandria	5-30M	1M
51	Kent Cox	Morgan Stanley Graystone	Richmond	5-10M	1M
52	Brandon LaCroix	Merrill Lynch Wealth Management	Roanoke	3-15M	500K
53	Scott Garnett	UBS Financial Services	Richmond	1.5-5M	500K
54	Andrew Lewis	The Lewis Financial Group	Reston	1-25M	1M
55	Douglas Gerace	Wells Fargo Advisors	McLean	5M	500K
56	Thomas Ashbridge V	BBT Securities - Scott & Stringfellow	Richmond	1-10M	1M
57	Joe Robinson	Merrill Lynch Wealth Management	Reston	1-25M	500K
58	Brian Jones	CJM Wealth Advisers	Fairfax	2-10M	1M
59	Scott Carr	The Carr Investment Group of Wells Fargo Advisors	Suffolk	5-10M	1M
60	Tim Neary	Merrill Lynch Wealth Management	Reston	500K-3M	275K
61	Jason King	Ameriprise Financial Services	Richmond	1-7M	100K
62	Scot Morris	Raymond James Financial Services	Richmond	1-5M	500K
63	W. Scott Mowry	Legacy Financial Group/Raymond James	Williamsburg	2-6M	500K
64	Christine Emond	Ameriprise Financial Services	Fairfax	1.5-15M	0
65	Mark Lange	Morgan Stanley Wealth Management	Richmond	1-15M	500K
66	Darren Mazzoni	Merrill Lynch Wealth Management	Richmond	500K-10M	500K
67	Jeremy Kuhlen	The Colony Group	Richmond	2-8M	1M
68	Nicholas Harris	Cassaday & Company	McLean	2.5-6.5M	1M
69	Robert Testwuide III	Merrill Lynch Wealth Management	Reston	4-100M	1M
70	Eddie Link	UBS Financial Services	Roanoke	2-20M	1M
71	Mike Kemp	UBS Financial Services	Roanoke	2-20M	500K
72	Jeffrey Nau	Merrill Lynch Wealth Management	Alexandria	4-40M	1M
73	Scott George	Mason Investment Advisory Services	Reston	8-50M	5M
74	Chris Beal	Morgan Stanley Wealth Management	Newport News	500K-5M	250K
75	Christopher Coffing	Merrill Lynch Wealth Management	Norfolk	1-4M	750K
76	George Nottingham	Wells Fargo Advisors	Norfolk	1-5M	500K
77	Mike Long	Merrill Lynch Wealth Management	Reston	2-6M	1M
78	Rob Wood Jr.	Raymond James & Associates	Richmond	500K-4M	500K
79	Gary Bonnewell	Morgan Stanley Wealth Management	Newport News	1-15M	1M
80	Nancy Popovich	Baird	McLean	1-5M	5K
81	Khalil Andraos	Merrill Lynch Wealth Management	Reston	1-10M	250K
82	Jonathan Chasen	Wells Fargo Advisors	Charlottesville	1-10M	500K
83	JT Carradice	Ameriprise Financial Services	Woodbridge	2-10M	500K
84	Adam Marr	Wells Fargo Advisors	Hampton	1-5M	500K
85	Charles Bull	Merrill Lynch Wealth Management	Charlottesville	1-25M	500K
86	Craig Beden	MML Investors Services	Vienna	1-15M	1M
87	Matt Chalfant	UBS Financial Services	Vienna	4-10M	1M
88	Ron Cain	Wells Fargo Advisors	Richmond	2.5-5M	500K
89	Mike Muehr	UBS Financial Services	Vienna	4-10M	1M
90	Michele Dandrea	Morgan Stanley Wealth Management	McLean	1.2-10M	1M
91	Robert Krebs Jr.	Raymond James & Associates	Virginia Beach	2.3-6.5M	1M
92	Drew Karr	BB&T Scott & Stringfellow	McLean	25-50M	2.5M
93	Rebecca Hall	Ameriprise Financial Services	Reston	2-10M	1M
94	Roy Hargrove III	Wells Fargo Advisors	Williamsburg	1-5M	250K
95	John Higgins	Wells Fargo Advisors	Charlottesville	18-30M	2.5M
96	Leonard Levitch	Ameriprise Financial Services	Richmond	500K-3M	50K
97	James Flannery	Merrill Lynch Wealth Management	Vienna	1-5M	500K
98	Emilio Sanchez	Morgan Stanley Wealth Management	McLean	1.5-10M	250K
99	Eric Parker	Morgan Stanley Wealth Management	Charlottesville	2-10M	1M
100	Christopher Schreiner	Mason Investment Advisory Services	Reston	5-25M	1M
101	Lori Anne Caumeil	Morgan Stanley Wealth Management	McLean	5-7M	1M
102	Pat McAleer	Ameriprise Financial Services	Richmond	2.1-5M	1M
103	Thomas Graham	Janney Montgomery Scott	Alexandria	1-12M	250K
104	Fardin Nematollahi	UBS Financial Services	Vienna	785K-12M	500K
105	Roger Kasch	Ameriprise Financial Services	Glen Allen	1.5-6M	250K
106	Wendy Payne	Centurion Wealth Management	McLean	1-15M	500K
107	Harvey Berger	Ameriprise Financial Services	Fairfax	1.6-14M	0
108	Gregory Nerantzis	Merrill Lynch Wealth Management	Leesburg	2-15M	500K
109	David Mead	Merrill Lynch Wealth Management	Reston	1.5-6M	500K
110	Mark Rodman	Merrill Lynch Wealth Management	Fredericksburg	2-8M	500K

1 Client types represent 5% or more of each advisor's business.

Data provided by SHOOK™ Research, LLC

Data as of 6/30/19

2 Advisors are judged on individual contribution but total team assets are shown, which can include one or more additional advisors.

3 Minimum account sizes are general since it can vary depending on a range of circumstances.

The ranking, developed by SHOOK Research, is based on in-person and telephone due diligence meetings and a ranking algorithm that includes: a review of best practices, client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms. Investment performance is not a criterion because audited records rarely exist and clients have varying risk levels. Rankings are based on the opinions of SHOOK Research, LLC and not indicative of future performance or representative of any one client's experience. Neither Virginia Business nor SHOOK Research receive any compensation in exchange for placement on the ranking. For more information: www.SHOOKresearch.com.