

FORBES BEST-IN-STATE

LPL Financial Affiliated Advisors

- Wayne Harris, Bridgeworth Wealth Management, Birmingham, AL
- Brian Hinson, Bridgeworth Wealth Management, Huntsville, AL
- Andrew Blease, Blease Financial Services/LPL, Tucson, AZ
- Michael Treiberg, Treiberg Wealth Management, Tucson, AZ
- David La Pointe, LPL Financial, Temecula, CA
- Louis F. Batmale, Alders Financial Solutions, Novato, CA
- Greg Solis, Solis Wealth Management, La Quinta, CA
- Craig Macomber, Stratos Wealth Partners, Irvine, CA
- Michael Allard, CalBay Investments/LPL, Danville, CA
- Anh Tran, SageMint Wealth, Orange, CA
- Daniel Romero, Romero & Levin Wealth Management/LPL, Orange, CA
- Daniel Gensler, The Gensler Group/LPL, Coronado, CA
- Gregg Patenaude, LPL Financial, San Diego, CA
- Laila Pence, Pence Wealth Management, Newport Beach, CA
- Michael Donohue, DB Wealth Management Group, San Diego, CA
- Brian Wong, Red Tower Advisors, San Carlos, CA
- Michael Shanahan, Overland & Shanahan Wealth Advisors/LPL, San Diego, CA
- Kerrick Bubb, KWB Wealth, Redlands, CA
- Brandon Collier, Collier - Retirement by Design, Denver, CO
- James Lunney, The Wealth Strategies Group/LPL, Littleton, CO
- Andrew Dodds, Dodds Wealth Management Group/LPL, Greenwood Village, CO
- Andrew Macdonald, Macdonald Financial Services, Loveland, CO
- Steve Booren, Prosperion Financial Advisors, Greenwood Village, CO
- Mark Brown, Brown and Company, Denver, CO
- Peter Tedstrom, Tedstrom Wealth Advisors, Denver, CO
- Mason Samuels, LPL Financial, Greenwood Village, CO
- Lori Price, Price Financial Group/LPL, Wilton, CT
- Joan Valenti, LPL Financial, Farmington, CT
- G. Ward Keever IV, Covenant Wealth Strategies, Wilmington, DE
- Shon Flaharty, Flaharty Asset Management, Clearwater, FL
- Chris Sanchez, Sanchez Wealth Management Group/ LPL, Jacksonville, FL
- Joseph Walsh, Walsh & Associates, Sarasota, FL
- Kay Lynn Mayhue, Merit Financial Advisors, Alpharetta, GA
- Robert Patti, Stratos Wealth Partners, Cumming, GA
- Shannon Sullivan, Sullivan & Schlieman Wealth Management, Alpharetta, GA
- Rick Kent, Merit Financial Advisors, Alpharetta, GA
- William Ren, LPL Financial, Deerfield, IL
- Steven Dudash, IHT Wealth Management, Chicago, IL
- Ryan Williamson, Horizon Wealth Management, LaGrange, IL
- Craig Bolanos, Wealth Management Group/LPL, Inverness, IL
- Timothy McGrath, Riverpoint Wealth Management, Chicago, ILAngelo Imbrogno, LPL Financial, Darien, IL
- Alan Alderfer, Alderfer Bergen & Co./LPL, Warsaw, IN
- Dan Wilburn, R.B. Smith Co/LPL, Valparaiso, IN

- Don Clark, Personal Financial Group, Overland Park, KS
- Eugene Songy, LPL Financial, Houma, LA
- Troy Touns, Goss Advisors DBA Touns Wealth Management, Destrehan, LA
- Paul Saltaformaggio, Hibernia Wealth Management, Baton Rouge, LA
- Deborah Goodman, Goodman Advisory Group, Needham, MA
- Richard Carr, Carr Financial Group, Worcester, MA
- Timothy Leveroni, Leveroni Financial Management, Braintree, MA
- Earl Winthrop, Winthrop Wealth, Boston, MA
- Mark Winthrop, Winthrop Wealth, Boston, MA
- Gina Bolvin Bernarduci, Bolvin Wealth, Boston, MA
- Susan Kaplan, Kaplan Financial Services, Newton, MA
- Marc Freedman, Freedman Financial, Peabody, MA
- Tom Quirk, LPL Financial, Catonsville, MD
- Aaron Puckett, Puckett & Sturgill Financial Group/LPL, Westminster, MD
- Chris Cox, The Monitor Group, Rockville, MD
- Brian Bernatchez, LPL Financial, Waterville, ME
- Nathanael Flynn, LPL Financial, East Lansing, MI
- Charles Zhang, Zhang Financial, Portage, MI
- Jason VanDuyn, LPL Financial, Sterling Heights, MI
- Patrick Deeg, Marks Group Wealth Management, Minnetonka, MN
- David Boniface, Legacy Capital Wealth Management (LPL), Forest Lake, MN
- Bennett Marks, Marks Group Wealth Management, Minnetonka, MN
- Jason Priebe, Priebe Wealth, Maple Grove, MN
- Sean McDermott, Summit Investment Advisors/LPL, Roseville, MN
- Lisa Guzek Montagne, LGM Wealth Management, Bloomington, MN
- John Horseman, Horseman Group, St. Louis, MO
- Frank Van Kirk, Stratos Wealth Partners/LPL, Gulfport, MS
- William Smith, Natchez Wealth Management, Natchez, MS
- Rick Fisher, Fisher Wealth Management, Burlington, NC
- Justin Gibson, Silverleaf Wealth Management, Omaha, NE
- Raymond Noel, LPL Financial, Bedford, NH
- Gary Pelletier, LPL Financial, Nashua, NH
- Scott Schwartz, Bleakley Financial Group, Fairfield, NJ
- Jamie Baraldi, LPL Financial, Mount Laurel, NJ
- Francis Astorino, LPL Financial, Fairfield, NJ
- Michael Axelrod, Bleakley Financial Group, Fairfield, NJ
- John Cooney, Bleakley Financial Group, Fairfield, NJ
- Richard Wright Jr., Bleakley Financial Group, Fairfield, NJ
- Reed Finney, Bleakley Financial Group, Fairfield, NJ
- Kenneth Van Leeuwen, Van Leeuwen & Company, Princeton, NJ
- Andy Schwartz, Bleakley Financial Group, Fairfield, NJ
- Lyle Weintraub, Bleakley Financial Group, Fairfield, NJ
- Frank Lepore, Bleakley Financial Group, Fairfield, NJ
- James Costabile, LPL Financial, Wall Township, NJ
- Michael Carpenter, Danielson Financial Group, Las Vegas, NV
- Deborah Danielson, Danielson Financial Group, Las Vegas, NV
- Marc Specht, PM Wealth Management, New York, NY
- Leonard Valletta, Albany Financial Group, Albany, NY
- Frank Fantozzi, Planned Financial Services, Cleveland, OH
- Michael Bohmer, Bohmer Kilcoyne Wealth Management, Cincinnati, OH
- Julia Carlson, Financial Freedom Wealth Management Group/LPL, Newport, OR

- Michael Hirthler, Jacobi Capital Management, Wilkes Barre, PA
- Emilio Morrone, One Financial Services, Allentown, PA
- Leslie Williams, First Financial Networks, Inc., Exton, PA
- Michael Boyer, Boyer Financial Planning/LPL, Somerset, PA
- Micah Kelley, The Kelley Financial Group, Sewickley, PA
- Gary Deese, Crescent Financial Group, Lexington, SC
- Reginald Armstrong, Armstrong Wealth Management Group, Florence, SC
- Dan Davis, ADK Wealth Advisory Group & Financial Planning World, Franklin, TN
- Enzo Pellegrino, Texas Legacy Wealth Management/LPL, San Antonio, TX
- David Winston, Winston Wealth Advisors, Lubbock, TX
- Wayne Garrett, LPL Financial, Weatherford, TX
- James Cox, Harris Financial Group/LPL, Richmond, VA
- Thomas Turner, Northwest Financial Advisors, Herndon, VA
- David Elmore, LPL Financial, Waynesboro, VA
- Susan Wilkinson, Wilkinson Wealth Management, Charlottesville, VA
- Tait Lane, Triad Financial Strategies, Issaquah, WA
- Sarah Carlson, Fulcrum Financial Group/LPL, Spokane, WA
- Wesley Burns, LPL Financial, Seattle, WA
- Matthew Riesenweber, Cornerstone Wealth Strategies, Kennewick, WA
- Christopher Mitchell, IAG Wealth Partners, Waukesha, WI
- Lori Watt, IAG Wealth Partners, Waukesha, WI
- Daniel Catone, Redwood Investments, Powell, WY
- Jeffrey Vincent, Vincent Financial Services, Riverton, WY

The Forbes Best-In-State Wealth Advisor ranking, developed by SHOOK Research, is based on in-person and telephone due diligence meetings and a ranking algorithm that includes: client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK Research receives a fee in exchange for rankings.

Securities and advisory services offered through LPL Financial (LPL), a registered investment advisor and broker-dealer (member FINRA/SIPC). Insurance products are offered through LPL or its licensed affiliates. To the extent, you are receiving investment advice from a separately registered independent investment advisor that is not an LPL Financial affiliate, please note LPL Financial makes no representation with respect to such entity.

Not Insured by FDIC/NCUA or Any Other Government Agency | Not Bank/Credit Union Guaranteed | Not Bank/Credit Union Deposits or Obligations | May Lose Value

The Advisor firms listed and LPL Financial are separate entities.

