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Book *of* Lists

The **essential tool** for doing business in Greater Philadelphia *2009*

MORE THAN 100 RANKINGS
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Wealth advisers

(Ranked by The Winner's Circle quantitative and qualitative criteria)

'08 Rank	Name Firm	City/State	Retail less than \$1M ¹	High net worth \$1M-\$10M ¹	Ultra high net worth \$10M+ ¹	Foundations	Endowments	Small business	Typical account size (in millions)	Typical net worth (in millions)	Team total assets (in millions)
1.	Saly Glassman Merrill Lynch & Co.	Blue Bell, Pa.	x	x	x	x	x	x	\$10	\$15	\$1,650
2.	Peter Rohr Merrill Lynch & Co.	Philadelphia, Pa.		x	x				\$30	\$150	\$1,386
3.	Walter Meranze Wachovia Securities	Yardley, Pa.	x	x	x	x		x	\$1.2	\$6	\$2,100
4.	Mark Fendrick Morgan Stanley	Voorhees, N.J.	x	x	x				\$1.5	\$5	\$400
5.	Thomas Seiler Smith Barney	Newtown, Pa.	x	x				x	\$3-5	\$4-55	\$455.8
6.	John Solis-Cohen Wachovia Securities	Jenkintown, Pa.	x	x					\$4-\$5	\$8	\$675
7.	Andrew Nehrbas Smith Barney	Bryn Mawr, Pa.	x	x	x	x		x	\$1	\$3	\$795
8.	Joseph Cozza* JP Morgan Private Bank	Philadelphia, Pa.			x				\$80-\$100	\$80-\$100	\$14,000
9.	Rosalie Hunter* JP Morgan Private Bank	Philadelphia, Pa.		x	x				\$25-\$50	\$50+	\$14,000
10.	Anthony Celentano** Deutsche Bank Alex. Brown	Philadelphia, Pa.		x	x				\$22	\$40	\$1,200
11.	Chip Kurtzman** Deutsche Bank Alex. Brown	Philadelphia, Pa.		x	x				\$22	\$40	\$1,200
12.	John Wildemore UBS Financial Services	Philadelphia, Pa.	x	x					\$1-\$5	\$1-\$10	\$385
13.	Steve Cordasco RBC Wealth Management	Philadelphia, Pa.		x	x		x		\$2-\$3.5	\$5	\$512
14.	Bruce Fryer Smith Barney	Conshohocken, Pa.	x	x	x				\$3	\$5	\$375
15.	Tridit Wallker Morgan Stanley	Philadelphia, Pa.		x	x	x	x	x	\$10+	\$50	\$1,600
16.	Sidney Geller Wachovia Securities	Philadelphia, Pa.	x	x	x	x	x	x	\$3	\$15	\$875
17.	David Wilson Morgan Stanley	Wayne, Pa.	x	x	x				\$2.5	\$8-\$10	\$325
18.	Paul Baker Wachovia Securities	Jenkintown, Pa.	x	x	x	x			\$1-\$5	\$2.5-\$7.5	\$220
19.	Robert Boland RBC Wealth Management	Philadelphia, Pa.	x	x	x			x	\$2	\$5	\$465
20.	Dirk Stribny Smith Barney	Berwyn, Pa.	x	x					\$1-\$5	\$2-\$10	\$264
21.	John Garvey UBS Financial Services	Philadelphia, Pa.		x	x				\$5	\$7-\$10	\$593
22.	Douglas Kibak Citi Family Office	West Conshohocken, Pa.	x	x	x				\$5+	\$25+	\$530
23.	John Sodaski Jr. Smith Barney	Philadelphia, Pa.	x	x	x				\$-75	\$3-\$10	\$370
24.	Elaina Spilove Smith Barney	Philadelphia, Pa.	x	x		x	x		\$10	\$2	\$2,570
25.	Brett Rhode UBS Financial Services	Conshohocken, Pa.	x	x	x				\$2-\$5	\$3-\$10	\$345

The List

LIST FACTS

M= Millions

Footnotes: 1- Investable assets, excluding primary residence; "x" indicates that at least 5% of the adviser's business comes from that area; * and ** indicates advisers are team mates.

Ranking criteria

The Winner's Circle team vetted each Series-7 registered adviser through a host of quantitative and qualitative criteria, including assets managed, revenues, experience levels, acceptable compliance records and U4 forms, discussions with management and more. Because client portfolios vary and are typically unaudited, portfolio performance is not a criteria; instead, the Winner's Circle focuses on customer satisfaction and client retention.

Ranking algorithm includes revenues produced, but is not published.

Account size and net worth refer to individual business, not institutional; net worth includes primary residence.

Total team assets include custodied and non-custodied assets that adviser and team advise. Adviser is ranked on individual assets, or percentage of contribution to team; some individuals on list are not part of teams and assets reflect only their share. Different weightings are assigned to different types of assets.

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