



TOP WEALTH MANAGERS

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NABCAP

Adding Transparency to the Financial Services Industry



Premier Advisors List

Advisory Practice Name Firm Name	Average Assets Under Management Per Client	Average number of clients per advisor	Advisors to Support Staff	Credentials Top Five Specialties	City, State, Phone
Albert B. Woodward, Jr. Woodward Wealth Management Group, Inc.	\$8,670,000	42	3:02	CFP HP, EP, PM, CM, PA	Greenwood Village, CO 303-355-0556
Arapaho Asset Management LLC Centaurus Financial Inc	\$770,000	47	4:06	N/APP RP, FP, HP, RS, RM	Frisco, CO 800-834-5543
Atlantic Trust Atlantic Trust	\$7,470,000	24	7:11	CFA, CFP IM, FS, EP, CM, AM	Denver, CO 720-221-5000
Avant-Garde Advisors LLC Avant-Garde Advisors LLC	\$600,000	15	15:07	CFA, CFP RP, IM, PM, CP, PA	Denver, CO 303-900-1370
Benton & Company Lincoln Financial Advisors	\$1,040,000	60	1:01	CFP RP, FP, IM, PP, FS	Denver, CO 303-714-4748
Biebel, Dodge, Campbell & Dillon Wells Fargo Advisors	\$1,600,000	150	5:03	CFP FP, IM, PM, CM, AM	Denver, CO 720-947-6613
BNY Mellon Wealth Management BNY Mellon Wealth Management	\$2,445,000	45	6:03	CFA FP, IM, PP, FS, CM	Denver, CO 303-394-7896
Brown & Tedstrom, Inc. LPL Financial	\$2,230,000	91	2:14	CFP RP, FP, FS, EP, CM	Denver, CO 303-863-7231
BSW Wealth Partners BSW Wealth Partners	\$2,610,000	45	5:04	CFP FP, FS, EP, PM, CM	Boulder, CO 303-444-9696
Cherry Street Partners Cherry Street Partners	\$940,000	65	4:01	CFP, CIMA FP, BP, RS, EP, CM	Denver, CO 303-399-9090
Client Centric Consulting UBS Institutional Consulting	\$5,010,000	42	2:06	CIMA PP, FS, RM, CM, AM	Denver, CO 303-689-2649
CoBiz Wealth Management CoBiz Wealth Management	\$500,000	29	14:06	CFA, CFP RP, FP, PM, CM, AM	Denver, CO 303-312-3400
Colvert/Harvey Group UBS Financial Services, Inc.	\$575,000	112	3:01	CFP, CIMA RP, RM, ES, PM, CM	Colorado Springs, CO 719-520-3650
Cornerstone Investment Advisors LLC Cornerstone Investment Advisors LLC	\$935,000	37	4:01	CFA, CFP RP, FP, IM, PM, CM	Boulder, CO 303-545-5400
Curtis Financial Strategies Group Wells Fargo Advisors	\$625,000	33	3:02	N/APP HP, RM, PM, LM, CM	Littleton, CO 303-763-8300
Custom Portfolio Group LLC Custom Portfolio Group LLC	\$1,100,000	66	1:03	N/APP RP, PM, CP, CM, AM	Englewood, CO 720-259-5113
Dana W. Albright Morgan Stanley Smith Barney	\$610,000	70	2:01	CFP, CIMA FP, SP, RM, CM, PA	Boulder, CO 720-562-6233
Denver Investments Schwab	\$3,142,206	50	7:03	CFA, CFP FP, IM, PM, CP, CM	Denver, CO 303-312-5000
Denver Money Manager LLC TD Ameritrade	\$420,000	33	4:01	CFP, AIF RP, FP, IM, LC, AM	Denver, CO 303-675-6767
Denver Retirement Partners AXA Advisors	\$625,000	60	5:02	CFP, CHFC, CLU RP, FP, WP, EP, PM	Denver, CO 720-946-4350
Dodds Wealth Management Group LPL Financial	\$800,000	73	3:02	CFP FP, IM, EP, CP, CM	Englewood, CO 303-539-3900
The Drexler Group Wells Fargo Advisors	\$1,330,000	40	3:01	CFP RP, WP, RM, PM, CM	Colorado Springs, CO 719-636-8000
Ethos Financial Partners Ameriprise Financial	\$255,000	222	9:09	CFP, CHFC, CLU RP, FP, WP, EP, CM	Thornton, CO 303-252-9777
Exit and Retirement Strategies, Inc. Exit and Retirement Strategies, Inc.	\$490,000	75	3:03	CHFC, CLU RP, WP, BP, EP, CM	Centennial, CO 720-876-2323
Gallacher Capital Management, LLC LPL Financial	\$250,000	167	3:03	CFP, CHFC, CLU WP, IM, EP, CM, PA	Greenwood Village, CO 303-708-1640
GHP Investment Advisors, Inc. GHP Investment Advisors, Inc.	\$1,290,000	87	5:06	CFA, CFP, CPA RP, FP, IM, FS, CM	Denver, CO 303-831-5000
Gill Capital Partners Gill Capital Partners	\$570,000	50	4:01	CFP, CIMA CS, WP, IM, BP, CM	Denver, CO 303-296-6260
Halbert Hargrove Halbert Hargrove	\$3,825,000	26	17:03	CFP, CPA FP, WP, HP, IM, CM	Denver, CO 562-435-5657
Harbor Financial Group, Inc. Schwab Institutional	\$1,030,000	22	4:03	CFA, CFP FP, IM, RM, EP, CM	Boulder, CO 303-939-8788
Hoover-Thisted Team Merrill Lynch	\$4,700,000	75	2:02	CIMA FP, IM, EP, ES, PM	Denver, CO 720-941-2034
Innovest Portfolio Solutions, LLC Innovest Portfolio Solutions, LLC	\$20,825,000	20	9:14	CFA, CIMA, CPA IM, RS, PM, CP, AM	Denver, CO 303-694-1900
Investment Trust Company Investment Trust Company	\$2,000,000	37	3:01	CFA IM, PM, CM, AM, SA	Denver, CO 303-778-6800
Janiczek & Company, Ltd. Schwab Institutional	\$2,125,000	48	3:05	CFA, CFP, CHFC RP, FP, IM, PM, CM	Greenwood Village, CO 303-721-7000
JBR Group Merrill Lynch	\$4,700,000	55	2:03	CFP, CIMA, CAIA, CRPS IM, PP, ES, LM, CM	Denver, CO 720-941-2090
Jeff Nelligan, Shellee Conrardy, Tara Lusche Morgan Stanley Smith Barney	\$1,000,000	40	3:01	CFP FP, HP, RS, ES, CM	Denver, CO 303-572-4034

Premier Advisors List

Advisory Practice Name Firm Name	Average Assets Under Management Per Client	Average number of clients per advisor	Advisors to Support Staff	Credentials Top Five Specialties	City, State, Phone
Key Private Bank KeyBank	\$1,910,000	11	7:01	CFP, CLU RP, FP, IM, BP, CM	Denver, CO 720-904-4431
Lang Investment Group Wells Fargo Advisors	\$1,270,000	75	4:01	CFP FP, WP, RM, PM, CP	Denver, CO 303-628-8501
Maez and Associates Ameriprise Financial Services, Inc.	\$180,000	229	4:04	CFP RP, WP, HP, ES, CP	Colorado Springs, CO 719-599-0833
McGrew/Baker Wealth Consulting Group UBS Financial Services, Inc.	\$715,000	150	2:02	N/APP RP, FP, RM, PM, CM	Colorado Springs, CO 719-520-3652
Meridian Wealth Management LPL Financial	\$535,000	125	4:03	CFP RP, FP, IM, PM, CM	Boulder, CO 720-274-1656
MJ Smith & Associates Raymond James	\$1,115,000	150	3:08	CFP, CIMA, CLU RP, FP, WP, IM, CM	Greenwood Village, CO 303-768-0007
Nissim Lembeck Wealth Managment Group UBS Financial Services, Inc.	\$1,645,000	100	2:04	CIMA CS, IM, PP, EP, CM	Denver, CO 303-820-5010
Nolen Western Co. Financial Network Investment Corporation	\$475,000	100	2:01	CFP, CHFC, CLU RP, FP, IM, BP, CM	Centennial, CO 303-779-1311
Nugent Group UBS Financial Services, Inc.	\$4,375,000	43	2:04	CIMA FP, PM, LM, CM, PA	Denver, CO 303-488-3167
Ogard Boh Group Robert W. Baird & Co.	\$800,000	131	2:02	CFP, CIMA FP, EP, PM, CM, SA	Denver, CO 303-270-6317
Pam Dumonceau Consistent Values, Inc.	\$500,000	200	1:04	N/APP RP, FP, IM, RM, CM	Greenwood Village, CO 303-804-0101
Pann/DeYoung Wealth Management Group UBS Financial Services, Inc.	\$920,000	97	2:04	CIMA, CPWA RP, BP, RM, EP, CM	Colorado Springs, CO 719-520-3660
Pelican Bay Group Morgan Stanley Smith Barney	\$9,010,000	26	5:08	CFA, CIMA, CRPS IM, EP, PM, LM, CM	Denver, CO 303-572-4889
Prosperion Financial Advisors LPL Financial	\$535,000	206	4:01	N/APP FP, SP, IM, RM, CM	Greenwood Village, CO 303-793-3202
R. H. Bastiaans & Associates Ameriprise Financial	\$385,000	186	1:02	CFP, CHFC, CLU RP, FP, IM, EP, CM	Denver, CO 303-689-7424
RMB Capital Management RMB Capital Management	\$2,495,000	86	11:16	CFA, CFP, CIMA, CPWA IM, FS, PM, CM, SA	Denver, CO 303-801-3600
Russell W. Petrin Morgan Stanley Smith Barney	\$400,000	240	1:01	CRPS RP, FP, IM, RM, CM	Englewood, CO 303-925-9607
S. Todd Warburton Raymond James & Associates	\$2,145,000	40	1:01	CIMA RP, FP, WP, RM, CM	Denver, CO 303-200-1441
Sharkey, Howes & Javer Charles Schwab	\$435,000	183	6:01	CFP, CLU RP, FP, IM, EP, PM	Denver, CO 303-639-5100
SRS Capital Advisors, Inc. Schwab & Fidelity	\$920,000	14	9:03	CFA, CFP, CHFC, CLU FP, IM, BP, PM, CM	Denver, CO 724-385-0274
Steinberg, Grimm & Associates Ameriprise Financial	\$515,000	87	3:02	CFP RP, FP, IM, EP, ES	Greenwood Village, CO 303-221-6418
Stone-Segal Wealth Management Group UBS Financial Services, Inc.	\$1,930,000	38	2:01	CFP FP, EP, ES, PM, CM	Denver, CO 303-488-3182
Stordahl Capital Management Wells Fargo Advisors Financial Network	\$590,000	220	1:02	CFP RP, FP, IM, CM, AM	Greenwood Village, CO 303-770-0602
Sullivan & Associates Raymond James	\$600,000	95	2:06	CFA, CFP, CRPS RP, FP, EP, PM, CM	Colorado Springs, CO 719-576-4500
The Holben Group, LLC The Holben Group, LLC	\$900,000	31	2:01	N/APP RP, FP, IM, EP, CM	Denver, CO 303-691-1970
The Milestone Group The Milestone Group	\$5,000,000	36	7:13	CFA, CFP, CPA FP, IM, PM, CM, AM	Denver, CO 303-539-0100
The Palm Group Robert W. Baird & Co.	\$510,000	125	2:01	CFP, CIMA RP, FP, RM, AM, SA	Denver, CO 303-270-6318
Tochihara/Culberson Morgan Stanley Smith Barney	\$460,000	150	2:01	CFA, CFP RP, FP, WP, PM, CM	Boulder, CO 303-545-1844
Trailhead Group Morgan Stanley Smith Barney	\$1,135,000	100	2:02	N/APP FP, IM, FS, RM, ES	Boulder, CO 303-545-1830
Trevor Travis Guthrie Group Merrill Lynch	\$1,505,000	100	3:02	CFP FP, SP, ES, PM, CM	Denver, CO 720-941-2024
United Capital Financial Advisors United Capital Financial Advisors	\$320,000	182	11:05	CFA, CFP RP, IM, RS, RM, AM	Highlands Ranch, CO 303-972-7786
Wagner Wealth Management Charles Schwab	\$3,052,000	20	5:05	CFA, CFP RP, FP, IM, EP, CM	Denver, CO 303-394-9600
Wealth Management Consultants, Inc. Wealth Management Consultants, Inc.	\$3,410,000	33	3:01	CIMA HP, IM, BP, CM, AM	Denver, CO 303-292-9224
Wilkins Investment Group RBC Wealth Management	\$550,000	171	2:02	N/APP RP, FP, IM, PM, CM	Denver, CO 303-595-1154
Willenbrock Group UBS Financial Services, Inc.	\$1,350,000	50	2:01	CIMA RP, IM, EP, PM, CM	Denver, CO 303-486-8981

Key to List

Credentials Index

CEP – Certified Estate Planner

CFA – Chartered Financial Analyst

CFP – Certified Financial Planner

CIMA – Certified Investment Management Analyst

CAIA – Chartered Alternative Investment Analyst

CPWA – Certified Private Wealth Advisor

CHFC – Chartered Financial Consultant

CRPS – Chartered Retirement Plans Specialist

CLU – Chartered Life Underwriter

MCEP – Master Certified Estate Planner

CPA – Certified Public Accountant

AIF – Accredited Investment Fiduciary

N/APP – None Applicable

Specialties Index

RP: Retirement Planning

FP: Financial Planning

EP: Estate Planning

SP: Special Needs Planning

PP: Philanthropic Planning

BP: Business Planning

WP: Wealth Preservation/Insurance

CP: Capital Preservation

CM: Comprehensive Wealth Management

AM: Asset Allocation Management

PM: Portfolio Management

IM: Investment Management

RM: Risk Management

LM: Liability Management

RS: Retirement Services

CS: Corporate Services

FS: Family Office Services

ES: Executive Services

PA: Professional Athletes

HP: High Profiled Individuals

LC: Low Cost Provider

SA: Separately Managed Accounts



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