

# Top 50 Women in Wealth Management



FIRST NAME	LAST NAME	TITLE	FIRM NAME	FIRM WEB ADDRESS	CITY	STATE
Karen	Altfest	B, Vice President	L. J. Altfest & Co., Inc.	www.altfest.com	New York	NY
Patricia	Angus	Principal and CEO	Angus Advisory Group LLC	www.angusadvisorygroup.com	New York	NY
Sheila	Bair	Chairman	FDIC	www.fdic.gov	Washington	DC
Charlotte	Beyer	Founder and CEO	Institute for Private Investors	www.memberlink.net	New York	NY
Jessica M.	Bibliowicz	Chairman, President and CEO	National Financial Partners Corp.	www.nfp.com	New York	NY
Mari	Buechner	President	Coordinated Capital Securities, Inc.	www.cccmadison.com	Madison	WI
Debra	Brede	CCO and CEO	DK Brede Inv. Mgmt., Inc.	www.bredeinvestment.com	Needham	MA
Peggy S.	Cabaniss	B, President	HC Financial Advisors, Inc.	www.hcfinancial.com	Lafayette	CA
Marilyn	Capelli Dimitroff	B, President	Capelli Financial Services, Inc.	www.capellifs.com	Bloomfield Hills	MI
Carrie	Coghill-Kuntz	President	D. B. Root & Company	www.dbroot.com	Pittsburgh	PA
Cindy	Conger	C, PFS, B, President	Cynthia L. Conger CPA, PA	www.cindyconger.com	Little Rock	AR
Maria G.	Cornelius	B, EVP	Burt Associates, Incorporated	www.burtassociates.com	Rockville	MD
Cheryl	Costa	B, Managing Director	AFW Wealth Advisors	www.afw.com	Natick	MA
Trish	Cox	COO	Schwab	www.schwab.com	San Francisco	CA
Amy	Croen	A, Co-Founder, Co-Pres., PM	Geneva Capital Management LLC	www.gcmltd.com	Milwaukee	WI
Beth	Dater	CIO AGAM; Spec. Adv. -Palisade	Palisade Capital Management	www.palisadecapital.com	Fort Lee	NJ
Stephanie	DiMarco	Founder and CEO	Advent Software	www.advent.com	San Francisco	CA
Gina Marie	Duryea	Owner, CEO	Pension Planners Securities, Inc.	www.askpensionplanners.com	Sacramento	CA
Coventry	Edwards-Pitt	MD, A, B, Sr. Client Advisor	Ballentine Finn	www.ballentine-finn.com	Waltham, Wolfeboro	MA NH
Shannon	Eusey	President, COO	Beacon Pointe Advisors	www.bpadvisors.com	Newport Beach	CA
Rosanne	Grande	B, CSA, E, MD - Client Svcs.	R. W. Rogé & Co., Inc.	www.rwroge.com	Bohemia	NY
Sara	Hamilton	Founder and CEO	FOX Family Office Exchange	www.foxexchange.com	Chicago	IL
Mellody	Hobson	President	Ariel Investment Management	www.arielinvestments.com	Chicago	IL
Cheryl	Holland	B, President	Abacus Planning Group	www.abacusplanninggroup.com	Columbia	SC
Abigail	Johnson	President	Fidelity Investments	www.fidelity.com	Boston	MA
Deena	Katz	Partner	Evensky & Katz	www.evensky.com	Coral Gables	FL
Barbara	Krumsiek	President and CEO	Calvert Group, Ltd.	www.calvert.com	Bethesda	MD

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Maria Elena	Lagomasino	CEO	GenSpring Family Offices	www.genspring.com	Palm Beach Gardens	FL
Diahann	Lassus	B, C, Co-founder, President	Lassus Wherley & Associates, P. C.	www.lassuswherley.com	New Providence Bonita Springs	NJ FL
Alexandra	Lebenthal	CEO	Lebenthal and Alexandra & James	www.lebenthal.com	New York	NY
Kathleen	Longo	B, Principal	Accredited Investors, Inc.	www.accreditedinvestors.com	Edina	MN
Mary	Malgoire	B, President	The Family Firm	www.familyfirm.com	Bethesda	MD
Carolyn	Maloney	Congresswoman (D-NY)	US Congress	financialservices.house.gov	Washington	DC
Nancy	Meconi	C, B, Partner	Plante Moran Financial Advisors	www.plantemoran.com	Auburn Hills	MI
Karen	Novak	COO	Pershing Advisor Solutions LLC	www.pershing.com	Jersey City	NJ
Edythe	McClatchy Pahl	Executive Director	Inv. Mgmt. Consultants Assoc.	www.imca.org	Greenwood Village	CO
Rebecca	Pomering	CEO	Moss Adams Wealth Advisors LLC	www.mossadams.com	Seattle	WA
Amelia	Renkert-Thomas	Partner	Withers-Bergman	www.withersworldwide.com	New Haven	CT
Emily C.	Sanders	C, F, Pres., Founder, CEO, CIO	Sanders Financial Management	www.sandersfinancial.com	Norcross	GA
Mary	Schapiro	Chairman	Securities and Exchange Commission	www.sec.gov	Washington	DC
Muriel	Siebert	Founder	Muriel Siebert & Co., Inc.	www.siebertnet.com	New York	NY
Susan	Spraker	B, President, Founder	Spraker Wealth Management	www.sprakerwealth.com	Maitland	FL
Marita A.	Sullivan	C, Principal and CEO	JMG Financial Group, Ltd.	www.jmgfinancial.com	Oak Brook	IL
Margaret	Towle	MD, CPWA	Greycourt & Co., Inc.	www.greycourt.com	Portland	OR
Bonnie	Tracy	SVP, Dir. Consultant Relations	Appleton Partners, Inc.	www.appletonpartners.com	Boston	MA
Barbara	Turner	President and COO	The O. N. Equity Sales Co. (ONESCO)	www.onesco1.com	Cincinnati	OH
Rhona	Vogel	Founder, B, President	Vogel Consulting	www.vogelcg.com	Brookfield	WI
Amy L.	Webber	President and COO	Cambridge Investment Research, Inc.	www.joincambridge.com	Fairfield	IA
Debra L.	Wetherby	C, A, B, Principal, WM, and CEO	Wetherby Asset Management	www.wetherby.com	San Francisco	CA
Kim	Wright-Violich	President	Schwab Charitable	www.schwabcharitable.org	San Francisco	CA

## FOOTNOTES:

A--Chartered Financial Analyst

E-- Registered Financial Gerontologist

B--Certified Financial Planner

F--Certified Cash Manager

C--Certified Public Accountant

WM--Wealth Manager

D--Certified Private Wealth Advisor

MD--Managing Director