

## Top 50 NextGen IBD Advisors

REP.



Methodology: Advisors on the Top NextGen Independent Broker/Dealer Advisors list are ranked exclusively by total assets under management. To be eligible, advisors had to be under the age of 40 as of Jan. 1, 2015. We solicited nominations from the top 30 IBDs by headcount, sourced from Cerulli Associates. These are the firms that responded. REP. magazine and WealthManagement.com do not receive any compensation from financial advisors, participating firms and affiliates, or the media in exchange for rankings.

RANK	NAME	FIRM NAME	AUM (\$MM)	OFFICE LOCATION (CITY, STATE)	AGE (AS OF JAN. 1, 2015)
1	<b>Mark Berger</b>	Berger Financial Group (Cambridge Investment Research)	\$650	Plymouth, Minn.	33
2	<b>James A. Cox III</b>	Harris Financial Group (LPL Financial)	\$472	Richmond, Va.	39
3	<b>Christopher Hall</b>	Wells Fargo Advisors Financial Network	\$430	Parkersburg, W.Va.	38
4	<b>Khaled Taha</b>	SAGE Private Wealth Group (Raymond James Financial Services)	\$374	Wheaton, Ill.	37
5	<b>Matthew Somberg</b>	Gottfried & Somberg Wealth Management (Commonwealth Financial Network)	\$373	Glastonbury, Conn.	37
6	<b>Christopher Krell</b>	Cassaday & Company/Royal Alliance Associates	\$352	McLean, Va.	39
7	<b>Justin Prescott Harris</b>	Cassaday & Company/Royal Alliance Associates	\$348	McLean, Va.	38

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8	<b>Eli Wynes</b>	UICCU Wealth Management (Commonwealth Financial Network)	\$348	Iowa City, Iowa	33
9	<b>Carrie Wagner</b>	UICCU Wealth Management (Commonwealth Financial Network)	\$348	Iowa City, Iowa	35
10	<b>Andrew Karelis</b>	KSP Financial Consultants (Commonwealth Financial Network)	\$347	Waltham, Mass.	36
11	<b>Mark Delp</b>	Wells Fargo Advisors Financial Network	\$340	Santa Ana, Calif.	38
12	<b>Craig Houck</b>	Raymond James Financial Services	\$338	Atlanta	35
13	<b>Joshua Gottfried</b>	Gottfried & Somberg Wealth Management (Commonwealth Financial Network)	\$329	Glastonbury, Conn.	38
14	<b>Nathan Fisher</b>	Raymond James Financial Services	\$324	Cedar Rapids, Iowa	36
15	<b>Anthony Christensen</b>	Wells Fargo Advisors Financial Network	\$320	Louisville, Ky.	40
16	<b>Christopher Rivers</b>	Armstrong, Fleming & Moore (Commonwealth Financial Network)	\$277	Washington, D.C.	36
17	<b>Jeff Dobyns</b>	Raymond James Financial Services	\$277	Franklin, Tenn.	39
18	<b>Dennis McGuire</b>	Wells Fargo Advisors Financial Network	\$275	Charlestown, R.I.	38
19	<b>Philip DeAngelo</b>	Securities America	\$271	Highland, N.Y.	37
20	<b>Joshua Cavett</b>	Raymond James Financial Services	\$264	Beaumont, Texas	34

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21	<b>Steven Tonkinson</b>	Tonkinson Financial (Commonwealth Financial Network)	\$261	Miami	35
22	<b>Todd Wike</b>	Raymond James Financial Services	\$258	Calverton, Md.	35
23	<b>Lindsey Splendorio</b>	Wells Fargo Advisors Financial Network	\$251	Kalamazoo, Mich.	36
24	<b>Joseph Splendorio</b>	Wells Fargo Advisors Financial Network	\$251	Kalamazoo, Mich.	36
25	<b>John Westerman</b>	Selah Financial Services (Commonwealth Financial Network)	\$245	Friendswood, Texas	31
26	<b>Sherry Cesare</b>	Voya Financial Advisors	\$235	Melville, N.Y.	39
27	<b>Patrick Varney</b>	Raymond James Financial Services	\$231	Windsor, Colo.	37
28	<b>Scott Tobe</b>	Signature Financial Planning (NFP Advisor Services)	\$230	Pittsburgh	36
29	<b>Nathan Bennett</b>	Summit Financial Group (Securian Financial Services)	\$226	San Ramon, Calif	38
30	<b>Eric Burton</b>	FSC Securities Corp.	\$226	Tinley Park, Ill.	38
31	<b>Christopher Compton</b>	Compton Financial Group (LPL Financial)	\$217	Towson, Md.	39
32	<b>Erik Thompson</b>	Wells Fargo Advisors Financial Network	\$215	Dublin, Ohio	40
33	<b>James Cox</b>	McCarthy & Cox, Retirement & Estate Specialists (Commonwealth Financial Network)	\$213	Marysville, Ohio	38
34	<b>Michael Crews</b>	Ricker Retirement Specialists (LPL Financial)	\$211	Garland, Texas	34

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35	<b>Brian Hugh Vendig</b>	Royal Alliance Associates	\$206	Farmington, Conn.	38
36	<b>Tyson Ray</b>	Raymond James Financial Services	\$204	Lake Geneva, Wis.	39
37	<b>Matthew Adam Blecker</b>	Royal Alliance Associates	\$201	Pearl River, N.Y.	35
38	<b>David Adams</b>	Raymond James Financial Services	\$200	Nashville, Tenn.	36
39	<b>Jeremy Landon Keating</b>	FSC Securities Corp.	\$196	San Diego	37
40	<b>Brian Link</b>	Voya Financial Advisors	\$192	Dayton, Ohio	39
41	<b>Nathan Parkhurst</b>	Cumberland Wealth Management (Commonwealth Financial Network)	\$190	Oak Ridge, Tenn.	33
42	<b>David Hefty</b>	Hefty Wealth Partners (LPL Financial)	\$185	Auburn, Ind.	37
43	<b>Christopher Young</b>	Cassaday & Company/Royal Alliance Associates	\$177	McLean, Va.	37
44	<b>Jonathan Marzano</b>	Wells Fargo Advisors Financial Network	\$176	Clemmons, N.C.	40
45	<b>Jonathan Allen</b>	Raymond James Financial Services	\$175	Boone, N.C.	36
46	<b>Daniel Tresemer</b>	OnPath Financial	\$172	St. Charles, Ill.	39
47	<b>Shannon Staiger</b>	SBS Retirement Consultants (Commonwealth Financial Network)	\$171	Fairbanks, Alaska	39
48	<b>Jereme Ransick</b>	Principled Wealth Advisors (Commonwealth Financial Network)	\$171	Covington, Ky.	38