

## Most Experienced Independent Financial Advisers

To find the most experienced financial advisers, *BusinessWeek* teamed up with the [Paladin Registry](#), a service to vet advisers. Paladin founder Jack Waymire screened his database of more than 1,000 independent financial advisers who are scored on a 100-point system. Advisers receive the maximum number of points for 15 years of experience as well as for holding two major certifications, such as Chartered Financial Analyst and Certified Financial Planner. (For more info on certifications, visit the [Certifications for Financial Advisers Playbook](#))

**Special Report:** [Financial Advisers -- New Rules for Tough Times](#)

**Slide Show:** [Financial Advisers' Best Ideas](#)

To be included in the registry, advisers need to be independent and fees must be the primary form of compensation. Here are the 50 advisers (listed in order of experience) with the highest rankings in the Paladin Registry as well as the most work experience.

Click column heading once to reorder from highest to lowest. Click twice to reorder from lowest to highest.

Name	Location	Phone	Years of Experience *	Minimum Assets (\$)	Assets Under Management (Millions)	Certifications
ROBERT SCHUMANN	SALIDA, COLO.	719-539-1040	39	500000	60	CFP®, AIF, CHFC®, EA
LESLIE MERRITHEW	SAN DIEGO	858-547-1845	36	500000	58	CFP®, EA
FRANK ARMSTRONG	MIAMI	800-508-8500	34	500000	342	CFP®, AIF, CLU®
JEFF HICKS	BETHALTO, ILL.	618-259-1600	32	100000	70	CFP®, QFP
RICHARD HILLIARD	RALEIGH, N.C.	800-332-9409	32	100000	80	CFP®, CSA
MARTIN KURTZ	MOLINE, ILL.	309-797-4030	30	500000	170	CFP®, AIFA®
RICHARD SMITH	RICHMOND, VA.	804-565-9280	28	1000000	1057	CFP®, CIMA, AIFA®, CHFC®, CLU®
SCOTT HOLSTEIN	FEASTERVILLE, PA.	800-458-9330	27	1000000	134	CFP®, CPA, PFS, QFP
JOE MAAS	SEATTLE	206-386-5455	26	250000	65	CFP®, CHFC®, CLU®, CCIM
BRENT BRODESKI	ROCKFORD, ILL.	815-227-0300	25	500000	1500	CFP®, CFA®, AIFA®, CPA
RICHARD KAHLER	RAPID CITY, S.D.	605-343-1400	25	NA	1350	CFP®, CHFC®
LOUIS P. STANASOLOVICH	PITTSBURGH	888-236-5960	25	1000000	270	CFP®
ALLEN TAYLOR	BIRMINGHAM, ALA.	205-397-3333	25	50000	60	QFP, RFC
TERRY NELSON	ROSEVILLE, MINN.	651-638-9428	24	250000	42	CFP®
CHARLES AUERBACH	CORDOVA, TENN.	901-473-9000	22	250000	60	CFP®, CHFC®, CLU®, EA
WILLIAM BRENNAN	WASHINGTON, D.C.	202-296-3306	22	250000	160	CFP®, CPA, PFS
WALTER GUERTIN	NEWTON, MASS.	617-658-7619	22	250000	50	CFP®, CPA, PFS, CSA
AL OSGOOD	CINCINNATI, DAYTON	800-503-9500	21	1000000	63	CFP®
RICHARD CLARKE	SANTA ROSA, CALIF.	707-525-1163	20	250000	60	CFP®, CPA, PFS
TERRY DERU	SALT LAKE CITY	801-433-2000	20	100000	81	CFP®, RFC
ROGER PATTERSON	SAN FRANCISCO	415-977-1200	19	1000000	808	CIMA, CHFC®
MICHAEL BRIDGMAN	OMAHA	402-697-1166	17	500000	185	CHFC®, CLU®
GILES ALMOND	CHARLOTTE, N.C.	704-358-3322	16	500000	160	CFP®, CIMA, CPA, PFS
ROBERT HOROWITZ	SAN FRANCISCO	415-927-7871	16	500000	15	CFA®
BRIAN PUCKETT	OKLAHOMA CITY	800-401-6477	16	250000	103	CFP®, CPA, PFS
CHARLES DUNHAM	BIRMINGHAM, ALA.	205-803-3333	15	50000	25	CFP®, CHFC®, CLU®
JOHN ECKEL	SIMSBURY, CONN.	860-651-1716	15	500000	122	CFP®, CFA®
RICK JURRENS	EDMOND, OKLA.	405-844-9826	15	NA	85	CFP®, CHFC®, CLU®, RHU
SCOTT NOYES	NEW VERNON, N.J.	972-267-8120	15	500000	NA	CFP®, CFA®, AIFA®, CLU®, CCPS
DAVID WILDER	CINCINNATI	513-984-6696	15	500000	180	CFP®, CTFA
HARV AMES	PETERBOROUGH, N.H.	800-258-9939	12	500000	92	CFP®, AIFA®, CHFC®
SEAN CASTERLINE	LONGWOOD, FLA.	800-333-3700	12	100000	70	CFP®, CFA®
MICHAEL SEARCY	OVERLAND PARK, KAN.	916-814-3800	32	500000	112	CFP®, AIFA®, CHFC®, CLU®
STEPHEN AHERN	TEWKSBURY, MASS.	800-818-1120	10	500000	447	CFP®, CPA, PFS
SAM BILLS, JR.	FRANKLIN, TENN.	615-371-5928	10	100000	70	CFP®, CPA
NORMAN BOONE	SAN FRANCISCO	415-788-1952	10	1000000	400	CFP®
BART BOYER	ASHEVILLE, N.C.	888-877-1012	10	250000	303	CFP®
REGINALD CORINALDI	VIRGINIA BEACH, VA.	757-431-1414	10	250000	50	CFP®, CLU®, MBA
NED KARREN	SEATTLE	206-621-7400	10	1000000	738	CFA®
DEREK MCSHERRY	LAKE GENEVA, WIS.	262-348-9981	10	250000	250	CFP®, CHFC®, CFS, CSPG
ALAN GOLDFARB	DALLAS	972-448-6971	9	1000000	352	CFP®, AIF
KEN MAJMUDAR	SHORT HILLS, N.J.	973-544-6970	9	250000	48	CFA®
EDWARD MCDONOUGH	ORLANDO	407-248-9647	9	100000	78	CFP®

SCOTT OETH	EDINA, MINN.	952-926-1659	9	250000	150	CFP® , CHFC ©
ROB CHAPMAN	PITTSFORD, N.Y.	585-249-5060	8	250000	35	CPA , PFS , CMA
BILL CLEVELAND	AUGUSTA, GA.	706-855-0170	8	250000	45	CFP® , CPA , PFS
PJ DINUZZO	BEAVER, PA.	724-728-6564	20	250000	205	CPA , PFS, RFC
GARY KLEIN	SEAL BEACH, CALIF.	800-381-7431	8	250000	130	CHFC ©
KEVIN HOLLAND	NAPERVILLE, ILL.	630-544-5350	7	250000	85	CFP® , CPA , PFS , AAMS, CMFC
STEVEN SCHWARTZ	ROCHESTER, N.Y.	585-442-3230	7	500000	42	CPA , PFS
DAVID STROTHER	LAFAYETTE, LA.	337-237-0112	7	250000	90	CFP® , AIFA®
CHRIS MICKEL	INDIANAPOLIS	888-488-2536	5	100000	225	CFP®

\*Combined experience of partners in practice  
DATA: Paladin Registry