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Long shut out from the boys' club, women are starting to make a real mark on Wall Street. How five climbed to the top.



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DOWJONES

Top 100 Women Financial Advisers

Here are America's best women financial advisers, as identified by industry researcher R.J. Shook of The Winner's Circle Organization. The advisers—from brokerages, banks and some other firms—follow the industry's best practices and have the biggest books of business, Shook found. The scoring system assigns a value of 10 to the top adviser; the other scores are calculated by comparing each of the other advisers with the No. 1 finisher in terms of assets, revenue, customer satisfaction and other factors. Total assets represent the amount overseen by each adviser and her team, including some assets held for her clients at other institutions.

Rank	Name	Firm	Location	CUSTOMERS						Total Assets (\$ mil)	Typical Account (\$ mil)	Typical Net Worth (\$ mil)	Score
				Individuals (Up to \$1 mil)	High Net Worth (\$1-\$10 mil)	Ultra-High Net Worth (\$10 mil+)	Corporations	Foundations	Endowments				
50.	Linda Stirling	RBC Dain Rauscher	La Jolla, Calif.	◆	◆					250	2.2	8	8.547
51.	Teri Conklin	UBS Financial Services	Northbrook, Ill.	◆	◆					353	1.5	3	8.539
52.	Michele Huff	Bank of America/Family Wealth Advisors	Dallas			◆				1,500	N.A.	50+	8.525
54.	Patricia C. Brennan	Royal Alliance Associates	West Chester, Pa.	◆	◆	◆				225	1-3	1-4	8.504
55.	Orlene Ricci	Merrill Lynch	Phoenix, Ariz.	◆	◆					629	2.9-21	1.5-8	8.459
56.	Patricia Carey	Smith Barney	Oklahoma City	◆	◆	◆				410	1.5	2-5	8.484
57.	Gwen Pacarro	Morgan Stanley	Honolulu							237	2-15	8	8.475
58.	Patricia Meidell	American Retirement Planners	Reno, Nev.							196	.185-5	.75-8	8.465
59.	Patricia Cutilletta	Smith Barney	Chicago	◆	◆					265	1 to 5	2 to 8	8.453
60.	Carole Ford	Linsco/Private Ledger	Fresno, Calif.	◆	◆					260	1	3-10	8.445
61.	Lee Corey	Morgan Stanley	Alexandria, Va.	◆	◆	◆		◆	◆	380	2	5	8.431
62.	Ann Marie Etergino	RBC Dain Rauscher	Washington, D.C.	◆	◆			◆		330	.50	1.23	8.415
63.	Denise Izatt	Mutual Service	Oak Brook, Ill.	◆						289	.50	1	8.406
64.	Nancy Cooley	Smith Barney	New York		◆	◆				1,435	5-10	10-20	8.395
65.	Emily Bach	Morgan Stanley	Orinda, Calif.	◆	◆					900	1-3+	3-10+	8.381
66.	Debra Brede	DK Brede Inv. Mgmt./Commonwealth Finl.	Needham, Mass.		◆					297	1	3	8.370
67.	Susan Kingsolver	Smith Barney	New York	◆	◆	◆	◆			586	5-10	20-50	8.359
68.	Cynthia Hewitt	Merrill Lynch	Wilmington, Del.	◆	◆	◆				750	1-5	5-10	8.344
69.	Kathleen Malone	Wachovia Securities	Charlotte, N.C.	◆	◆					412	1.2	3.2	8.336
70.	Marja Norris	UBS Financial Services	Birmingham, Mich.	◆	◆	◆	◆			365	2	3.5	8.327
71.	Beatrice Cueto	Smith Barney	Miami		◆	◆				230	5	30	8.322
72.	Barbara Schaye	Credit Suisse	Boston		◆	◆				233	3-5	5-20	8.315
73.	Gwendolyn Campbell	UBS Financial Services	San Francisco		◆	◆				500	10+	10+	8.303
74.	Sharon Jacquet	JPMorgan Private Bank	New York		◆	◆				28,000	50	80	8.294
75.	Falisha Mamdani	Smith Barney	New York		◆	◆				1,415	5-10+	10-20+	8.284
76.	Lisa Humphreys	Piper Jaffray & Co.	St. Paul, Minn.	◆	◆		◆			203	1-3+	3-10	8.271
77.	Michele Dandrea	Smith Barney	McLean, Va.	◆	◆	◆				283	.50-5	1-6	8.265
78.	Rebecca Robertson	Wachovia Securities	Richmond, Va.	◆	◆	◆				345	0-1	1-10	8.260
79.	Sheila Shaffer	Smith Barney	Washington, D.C.	◆	◆	◆				360	.75-3	1.5-6	8.249
80.	Lori Ace Facinelli	Morgan Stanley	Rochester, N.Y.	◆	◆					425	.75-2	2-4	8.242
81.	Camilla Neri	Retirement Capital Strategies	San Jose, Calif.	◆	◆					384	.25-1	1.5-4	8.229
82.	Susan McCarthy	Morgan Stanley	Oklahoma City	◆	◆	◆		◆		218	.53	1	8.224
83.	Lana Engen	Ameriprise	Rockford, Ill.	◆	◆					200	.50-2+	.50-3	8.213
84.	Lisa Kevarian-Press	Robert W. Baird & Co.	Lake Forest, Ill.	◆	◆	◆	◆			250	1-5	2-10	8.204
85.	Nancy Barrette	Wachovia Securities	Birmingham, Mich.		◆					900	2	5	8.201
86.	Theresa Chacopoulos	Wells Fargo Private Client Services	Scottsdale, Ariz.		◆	◆		◆		1,000	3-30	5-50	8.197
87.	Barbara Jaffe	Wachovia Securities	Jacksonville, Fla.		◆	◆				540	2-4	5-10	8.194
88.	Eileen Murray	Smith Barney	San Francisco	◆	◆					477	1-3+	3-10+	8.192
89.	Taryn Sievers	Morgan Stanley	Oakland, Calif.		◆	◆				500	1-3	2-10	8.191
90.	Jane Brooke	Wachovia Securities	Richmond, Va.	◆	◆	◆		◆		1,100	1.3	5	8.189
91.	Cinda Collins	RBC Dain Rauscher	Minneapolis		◆					200	1.5	3-5	8.186
92.	Kia Friedman	Banc of America Investment Services	San Jose, Calif.	◆	◆	◆				386	1.5-3.5+	10	8.183
93.	Theresa Ward	Merrill Lynch	Bloomington, Minn.	◆	◆	◆	◆			1,100	1-3	3-10	8.179
94.	Sheila Klehm	JPMorgan Private Bank	New York			◆				7,400	45	60-1,000+	8.176
95.	Kathleen Roeser	Lincoln Financial Advisors	Chicago		◆	◆				800	2	7.5-10+	8.174
96.	Rita Mansour	Mansour Wealth Mgmt./McDonald Invest.	Toledo, Ohio	◆	◆	◆	◆			225	1.5	4	8.173
97.	Laurie Jones	Wachovia Securities	Virginia Beach, Va.	◆	◆					336	.50-1.5	1-3	8.172
98.	Lauri Binus Droster	RBC Dain Rauscher	Madison, Wis.	◆	◆					200	.30	.60	8.172
99.	Ingrid Lockhart	Morgan Stanley	Auburn, Calif.	◆	◆					286	.50-3	1-4	8.171
100.	Margo Shepard	Smith Barney	Kansas City, Mo.	◆	◆		◆	◆		341	.50-2	2-5	8.171

For more information on The Winner's Circle and the ranking methodology, go to www.wcorg.com

Source: R.J. Shook