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The Dow Jones Business and Financial Weekly

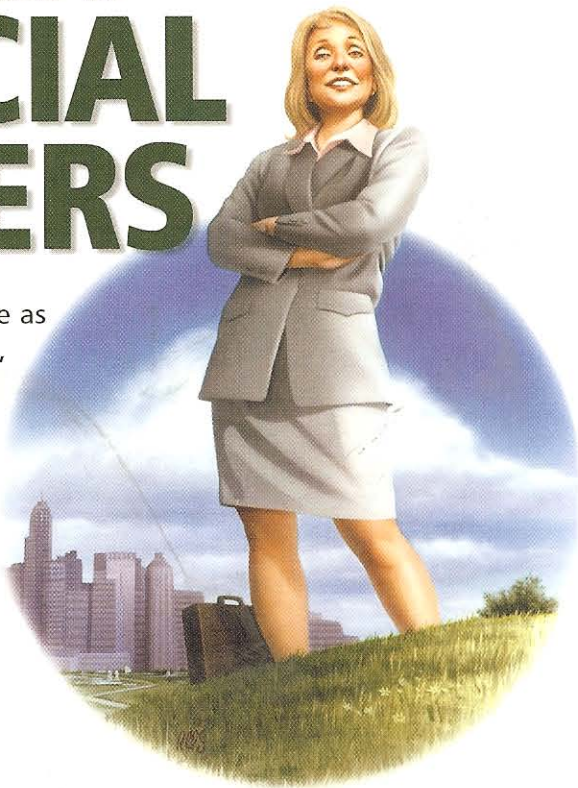
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# TOP 100 WOMEN FINANCIAL ADVISERS



Hailing from backgrounds as diverse as social work and derivatives trading, America's best female advisers help their clients manage billions. Right now, they are hedging against stock-market risk and looking overseas for opportunity.

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## The Top 100

Here are America's best female financial advisers from brokerages and banks, as identified by industry researcher R.J. Shook, author of The Winner's Circle books. The advisers, he says, follow the industry's best practices and have some of the biggest books of business. The scoring system assigns a value of 10 to the top adviser, then calculates the others' scores by comparing each with the No. 1 finisher in terms of assets under management, revenue, customer satisfaction and other factors. Total assets are those of the adviser's team; they include both those at the firm and those held elsewhere but overseen by the team. Institutional assets are given less weight in the scoring. N indicates an adviser is new to the list this year.

Rank '07 '06	Name	Firm	Location	CUSTOMERS			Foundations	Endowments	Institutional	Total Assets (\$mil)	Typical Account (\$mil)	Typical Net Worth (\$mil)	Score
				Individuals (Up to \$1 mil)	High Net Worth (\$1 mil-\$10 mil)	Ultra-High Net Worth (\$10 mil+)							
66	54	Patricia Brennan	Key Financial	West Chester, Pa.						253	1-3	1-5	8.5126

(over please)

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**DOWJONES**



# To Each Her Own

(the following has been excerpted)

**By Suzanne McGee** The women on the list—from brokerage houses, banks and independent firms—each took a different route to the top of their profession. Gwen Campbell of UBS became a financial adviser after working as an M&A banker and a derivatives trader.

Most in the top 100 now have the benefit of ample experience. Even as the U.S. stock market ventured recently into record territory, many leading advisers haven't forgotten the lesson of the late 1990s, when ebullience ended in large losses.

The rankings, which include 28 new names since last year, are based on the size of each adviser's book of business, the amount of revenue she generates and the calibre of the service she and her team provide.

Many charge fees based on assets under management, while some rely on trading commissions. While investment performance isn't an explicit criterion, the advisers tend to do very well for their clients, which only helps them attract and

retain more. The 72 repeaters raised assets under management by more than 25% in the past year or so, Shook says.

The consultant, who examined company records and spoke with the advisers, their supervisors and their colleagues, says he produces the lists to promote best practices. He isn't paid by any of the firms he monitors, although they might buy copies of books published by his Winner's Circle organization, based in Boca Raton, Fla.

## The Top 100

Here are America's best female financial advisers from brokerages and banks, as identified by industry researcher R.J. Shook, author of The Winner's Circle books. The advisers, he says, follow the industry's best practices and have some of the biggest books of business. The scoring system assigns a value of 10 to the top adviser, then calculates the others' scores by comparing each with the No. 1 finisher in terms of assets under management, revenue, customer satisfaction and other factors. Total assets are those of the adviser's team; they include both those at the firm and those held elsewhere but overseen by the team. Institutional assets are given less weight in the scoring. N indicates an adviser is new to the list this year.

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				Individuals (Up to \$1 mil)	High Net Worth (\$1 mil-\$10 mil)	Ultra-High Net Worth (\$10 mil+)	Foundations	Endowments					Institutional
50	36	Danielle Ambrose	Merrill Lynch	Los Angeles		•	•			721	10-75	10-100	8.7159
51	37	Diane Hirschhorn	Merrill Lynch	Los Angeles		•	•			721	10-75	10-100	8.7159
52	10	Deeann Grlebel	Wachovia Securities	Mesa, Ariz.	•					225	.500-1	.500-3	8.6963
53	N	Diane Doolin	Smith Barney	Pasadena, Calif.	•	•	•			395	1-3+	2.5-6+	8.6650
54	39	Kathy Tully	Morgan Stanley	Ontario, Calif.	•	•		•		450	.750	4	8.6415
55	N	Barbara Bencini	Merrill Lynch	Wayzata, Minn.	•	•	•			1,600	1-10	2-20	8.6364
56	N	Christina Benson Boyd	Merrill Lynch	Wayzata, Minn.	•	•	•			1,600	1-10	2-20	8.6364
57	N	Margaret Starner	Raymond James & Assoc	Coral Gables, Fla.	•	•	•			345	3-5	5-8	8.6062
58	42	Lisa Petrie	UBS Financial Svcs	Long Beach, Calif.	•	•	•			254	1-7	5-15	8.5871
59	32	Andrea Soter	Morgan Stanley	Oxnard, Calif.	•	•	•	•	•	350	2	3-5	8.5813
60	34	Melissa Campbell	Morgan Stanley	Scottsdale, Ariz.	•	•	•			420	2-4+	5-15+	8.5734
61	N	Kim Ciccarelli Kantor	Ciccarelli Advisory Svcs	Naples, Fla.	•	•	•			750	2-6	5-15	8.5686
62	N	R. Jo Kaufman	Smith Barney	Boca Raton, Fla.	•	•	•	•		250	1-5+	2-10+	8.5583
63	60	Carole Ford	LPL Financial Svcs	Fresno, Calif.	•	•	•			300	1	2	8.5564
64	51	Teri Conklin	UBS Financial Svcs	Northbrook, Ill.	•	•	•			458	1.5	3	8.5381
65	61	Lee Corey	Morgan Stanley	Alexandria, Va.	•	•	•	•	•	550	1-5	2-10	8.5231
66	54	Patricia Brennan	Key Financial	West Chester, Pa.	•	•	•			253	1-3	1-5	8.5126
68	65	Emily Bach	Morgan Stanley	Orinda, Calif.	•	•	•	•		865	1-4+	4-10+	8.5031
67	87	Barbara Jaffe	Wachovia Securities	Jacksonville, Fla.	•	•	•			670	3-5	5-10+	8.5028
70	N	Brenda Blisk	Legacy Advisors	McLean, Va.	•	•	•			210	1.6	15	8.5005
71	43	Laura Ladrihan	Morgan Stanley	Scottsdale, Ariz.	•	•	•			240	2	5	8.4895
72	80	Lori Ace Facinelli	Morgan Stanley	Rochester, N.Y.	•	•	•			457	.750-2	2-4	8.4819
73	48	Myra Koltun	UBS Financial Svcs	Boston	•	•	•	•		902	1-5	1-10	8.4702
74	N	Lori Whitney	Smith Barney	San Mateo, Calif.	•	•	•	•		430	3-10	3-10	8.4626
75	45	Kimberley Hatchett	Morgan Stanley	New York	•	•	•	•		2,000	10	25-100	8.4605
76	55	Diane Alecci	Merrill Lynch	Paramus, N.J.	•	•	•			798	.500-3	2-10	8.4582
77	56	Patricia Carey	Smith Barney	Oklahoma City	•	•	•	•		438	1-3	3-5	8.4485
78	83	Lana Engen	Ameriprise Financial	Rockford, Ill.	•	•	•			236	.500-2	1-4	8.4482
79	N	Barbara FINDER	Smith Barney	Chicago	•	•	•			300	1	5	8.4426
80	70	Marja Norris	UBS Financial Svcs	Birmingham, Mich.	•	•	•			375	2	3-5	8.4379
81	40	Wanda Austin	Smith Barney	Newport News, Va.	•	•	•			330	.500-3	5-10	8.4354
82	N	Theo Schwabacher	Morgan Stanley	San Francisco	•	•	•	•	•	700	3-10	7	8.4292
83	N	Anouchka Balog	Smith Barney	Laguna Niguel, Calif.	•	•	•			287	1-3+	5-10+	8.4287
84	N	Karen Ogard	A.G. Edwards & Sons	Denver, Colo.	•	•	•			204	1-3	3-10	8.4236
85	N	Teresa Jacobsen	UBS Financial Svcs	Stamford, Conn.	•	•	•		•	553	2-4	3-10	8.4171
86	N	Melissa Lowrey	Smith Barney	Dallas	•	•	•			1,500	20-50	100	8.4142
87	64	Nancy Cooley	Smith Barney	New York	•	•	•		•	1,487	5-10	10-20	8.4101
88	67	Susan Kingsolver	Smith Barney	New York	•	•	•		•	953	5-10	20	8.4029
89	46	Perry Trimble	Deutsche Bank Alex. Brown	Washington	•	•	•	•		455	5-10	10+	8.3945
90	59	Patricia Cutilletta	Smith Barney	Chicago	•	•	•			300	2-8	3-10	8.3937
91	N	Barbara Noda	Deutsche Bank Alex. Brown	San Francisco	•	•	•			554	1	5	8.3923
92	92	Kia Friedman	Banc of America Invest Svcs	San Jose, Calif.	•	•	•			420	1.5-5+	10+	8.3909
93	81	Camilla Neri	Retirement Capital Strat	San Jose, Calif.	•	•	•			461	.587	3-10	8.3881
94	63	Denise Izatt	Denise A. Izatt & Associates	Oakbrook, Ill.	•	•	•			300	.600	1	8.3836
95	N	Jennifer Kraus	Smith Barney	New York	•	•	•			825	3-12	5-50	8.3814
96	N	Charlene v.d. Pyl-Chee	Morgan Stanley	Honolulu	•	•	•	•		620	2	6	8.3774
97	91	Cinda Collins	RBC Dain Rauscher	Minneapolis, Minn.	•	•	•			280	3.5-5	5-8	8.3774
98	N	Alyssa Moeder	Merrill Lynch	New York	•	•	•		•	1,550	30	50-150	8.3768
99	69	Kathleen Malone	Wachovia Securities	Charlotte, N.C.	•	•	•			577	2	4-5	8.3751
100	84	Lisa Kevelian-Press	Robert W. Baird	Lake Forest, Ill.	•	•	•			375	1-6+	3-10+	8.37213

For more information on the Winner's Circle and the ranking methodology, go to: [www.wcrg.com](http://www.wcrg.com)

Sources: R.J. Shook