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# Best-In-State Advisor: The Top Ranked Wealth Managers In Every State



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In the age of robo-advice, the ability to meet with clients face-to-face can be a real competitive advantage. Unlike their digital counterparts, most top advisors specialize in multiple aspects of financial

planning, offering everything from retirement and tax advice to financing for a private jet. Reza Zafari, a Merrill Lynch Private Banking & Investment advisor from Los Angeles with \$15.5 billion under management, frequently opens his Rolodex to clients when the need arises, connecting them, for example, with medical specialists. "A big part of what we do is just help our clients, and not just with their portfolios," Zafari says.

Over 2,000 advisors have been ranked in their respective states by Shook Research. The ranking of Best-In-State Wealth Advisors is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person interviews, and quantitative data. Assets under management are as of 6/30/2017. [Click here for the complete list of Forbes Best-In-State Wealth Advisors.](#)

PATTI BRENNAN

KEY FINANCIAL

WEST CHESTER, PENNSYLVANIA

AUM: \$568 MILLION

Brennan, 57, attributes her 99% retention rate to her willingness to go "above and beyond." After a client had a heart attack, Brennan, a former intensive-care nurse, went to her client's home and learned the details of caring for her wheelchair-bound diabetic husband, in case another emergency arose. In terms of investing, Brennan is placing assets in sectors that have lagged. That means less tech and health care and heavier weightings in sectors like energy and industrials.