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2014 Top Advisor Rankings: Maryland



Ranked #1: David Zier ♦ For Zier, investment guidance is just part of the equation for clients' financial success. "They come to us for investment advice," he says. "They stay with us because of all the other things we do." Those other things include tax and estate planning, and they can be even more valuable to clients than great investment advice, Zier says. One example: setting up a grantor-retained annuity trust. GRATs, as they are known, serve to minimize tax liabilities as wealth is transferred between generations. Zier, 43, has also dispensed great investment advice over the years. During the tech boom in 1999, he urged clients with large single-stock positions to use prepaid forwards, a hedging tool, which protected their profits and principal when the market crashed. Zier started investing at age 13, and remembers watching CNBC as his friends watched football. He remains just as passionate today. -STEVE GARMHAUSEN

Rank	'14	'13	Name	Firm	Location	CUSTOMERS					Total Asset (\$mil)	Typical Account (\$mil)	Typical Net Worth (\$mil)
						Individuals (Up to \$1mil)	High Net Worth (\$1-10 mil)	Ultra-High Net Worth (\$10 mil+)	Foundations	Endowments			
1	1		David Zier	Convergent Wealth Advisors	Potomac, Md.	▪	▪				10945	26	67
2	2		Barry Garber	Deutsche Asset & Wealth Mgmt	Baltimore, Md.	▪	▪	▪	▪	▪	10945	15	25
3	3		Kent Pearce	Merrill Lynch Wealth Mgmt	Towson, Md.	▪	▪	▪	▪	▪	1059	7	20
4	5		Greg Hurlbrink	Morgan Stanley Wealth Mgmt	Baltimore, Md.	▪	▪	▪	▪	▪	1360	5.5	15
5	N		Leo Kelly	HighTower	Hunt Valley, Md.	▪	▪		▪	▪	872	5	10
6	7		Larry Boggs	Wells Fargo Advisors	Cumberland, Md.	▪	▪				1048	3	5
7	6		E. Geoffrey Sella	Raymond James/SPC Financial	Rockville, Md.	▪	▪				565	0.74	0.96
8	8		Brett D. Clifford	Deutsche Asset & Wealth Mgmt	Baltimore, Md.	▪	▪				1700	10	25
9	11		Joseph Jacques	Jacques Financial	Rockville, Md.	▪				▪	596	0.75	1.5
10	13		Tom Hill	Morgan Stanley Wealth Mgmt	Easton, Md.	▪	▪	▪			980	3	10
11	N		Neal Simon	Highline Wealth Mgmt	Rockville, Md.	▪	▪				1260	7	7
12	4		Gerald Scheinker	Janney Montgomery Scott	Baltimore, Md.	▪	▪	▪		▪	893	2.75	6
13	N		Ross Charkatz	Graystone Consulting	Potomac, Md.	▪	▪	▪	▪		5200	80	80
14	10		James Meek	Graystone Consulting	Baltimore, Md.	▪	▪	▪	▪	▪	1274	12.66	18
15	12		Brian Kroneberger Jr.	RBC Wealth Mgmt	Hunt Valley, Md.	▪	▪			▪	1173	2.5	4
16	9		Peter Dunne	Merrill Lynch Wealth Mgmt	Bethesda, Md.	▪	▪	▪	▪	▪	3424	40	40