

# JACQUES FINANCIAL

---

15430 AVERY ROAD  
ROCKVILLE, MD 20855

**JOSEPH W. JACQUES CPA**  
CERTIFIED FINANCIAL PLANNER™

ph (301) 738-1303  
fax (301) 738-1305

**Three years running, *Barron's*, the Nation's leading financial news magazine, names Joe Jacques among the Nation's top Financial Advisors.**

*Barron's* top 1,000 at: <http://online.barrons.com/report/top-financial-advisors/1000/maryland>

For the third straight year, *Barron's* has placed Joe among America's top financial advisors. Joe was one of only 20 Maryland based advisors to make the National top 1,000 list.

Joe credits this recognition to his continued focus on client relationships and customer service. As part of this service, you have on-line access to all of your investments with Jacques Financial through our consolidated reporting system. You may access our consolidated reporting system by means of our website at [www.JoeJacquesCPA.com](http://www.JoeJacquesCPA.com) by merely clicking "CLIENT REPORT" on our homepage. We have already registered most of our clients. If you have forgotten your password or need assistance, please contact Robert Kirk at our office (extension 10). If you are not already an investment client, call us for your free financial planning review.

Joe is currently scheduling financial planning appointments. Please call our office at 301.738.1303x22 to make an appointment.

[www.JoeJacquesCPA.com](http://www.JoeJacquesCPA.com)

e-mail: [Joe@JoeJacquesCPA.com](mailto:Joe@JoeJacquesCPA.com)

## CUSTOMERS

Rank	10 09 Name	Firm	Location	Individuals	High Net Worth	Ultra-High Net Worth	Foundations	Endowments	Institutional	Total Assets (\$mil)	Typical Account (\$mil)	Typical Net Worth (\$mil)
				(Up to \$1mil)	(\$1-10 mil)	(\$10 mil+)						
1	1 Tom Hill	Morgan Stanley Smith Barney	Easton	▪	▪	▪	▪		▪	782	1-20	5-75
2	3 Greg Hurlbrink	Morgan Stanley Smith Barney	Baltimore	▪	▪	▪				739	5+	15
3	6 Leo Kelly	Merrill Lynch	Timonium	▪	▪	▪	▪			675	5-50	10-50
4	5 Larry Boggs	Wells Fargo Advisors	Cumberland	▪	▪	▪	▪			732	1-5	1-10
5	9 Brett Clifford	Deutsche Bank Alex. Brown	Baltimore	▪	▪	▪		▪	▪	1350	15-20	25-50
6	4 Barry Garber	Deutsche Bank Alex. Brown	Baltimore	▪	▪	▪	▪	▪	▪	1335	5-25	10-25
7	8 E. Geoffrey Sella	Raymond James	Rockville	▪	▪					447	0.6	1
8	7 Kent Pearce	Merrill Lynch	Towson		▪	▪			▪	582	5	5-50
9	N George Dunn	Convergent Wealth Advisors	Rockville	▪	▪	▪	▪	▪	▪	4800	60	40
10	11 Jonathan Murray	UBS Financial Services	Hunt Valley	▪	▪	▪	▪			475	5	10
11	10 Ronald Fishbein	Morgan Stanley Smith Barney	Gaithersburg	▪	▪	▪				450	1-7	5
12	N Jim Holzapfel	Wells Fargo Advisors	Hagerstown	▪	▪	▪	▪	▪	▪	625	1	2.5
13	N Joseph Jacques	Jacques Financial	Rockville	▪	▪					425	0.5	1.1
14	15 Robert Collins	WFA Financial Network	Bethesda	▪	▪	▪				498	0.5-3	1-10
15	N John Lynch	WFA Financial Network	Fulton	▪	▪					421	1-3	3-10
16	N Brian Kroneberger Jr.	RBC Wealth Management	Hunt Valley	▪	▪	▪			▪	800	1	2-5
17	14 Michael Meredith	Merrill Lynch	Baltimore	▪	▪	▪			▪	547	2	6
18	17 Jeff Leventhal	UBS Financial Services	Bethesda	▪	▪	▪				298	2	5
19	16 M. Kent Strosnider	Morgan Stanley Smith Barney	Baltimore	▪	▪	▪	▪	▪	▪	405	2	4
20	N Ann Marie Etergino	RBC Wealth Management	Chevy Chase	▪	▪	▪	▪		▪	456	1.4	3.5