

## 2018 Top Advisor Rankings: Maryland

| Rank | '18 | '17 | 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 |                     |                         |                           | Institutional |
| 1    | 1   |     | <b>Robert Scherer</b>     | Graystone Consulting             | Potomac, MD     |                            | ■                           | ■                                | ■           | ■          | ■                   | 8300                    | 25                        | 25            |
| 2    | 3   |     | <b>Kent Pearce</b>        | Merrill Lynch Wealth Mgmt        | Towson, MD      |                            | ■                           | ■                                | ■           |            |                     | 1491                    | 7                         | 20            |
| 3    | 5   |     | <b>Greg Hurlbrink</b>     | Morgan Stanley Wealth Mgmt       | Baltimore, MD   | ■                          | ■                           | ■                                | ■           | ■          |                     | 1303                    | 5.5                       | 15            |
| 4    | 4   |     | <b>Barry Garber</b>       | Alex.Brown Raymond James         | Baltimore, MD   |                            | ■                           | ■                                | ■           | ■          |                     | 2881                    | 15                        | 25            |
| 5    | 6   |     | <b>Joseph Jacques</b>     | Jacques Financial                | Rockville, MD   | ■                          | ■                           |                                  |             |            |                     | 755                     | 0.8                       | 2             |
| 6    | 8   |     | <b>E. Geoffrey Sella</b>  | SPC Financial / Raymond James    | Rockville, MD   | ■                          | ■                           |                                  |             |            |                     | 741                     | 0.8                       | 1.6           |
| 7    | 13  |     | <b>Jeff Leventhal</b>     | HighTower Bethesda at HighTower  | Bethesda, MD    | ■                          | ■                           | ■                                |             |            |                     | 925                     | 3                         | 7.5           |
| 8    | 11  |     | <b>Larry Boggs</b>        | Wells Fargo Advisors             | Cumberland, MD  | ■                          | ■                           | ■                                | ■           | ■          |                     | 1127                    | 3                         | 5             |
| 9    | 9   |     | <b>Ross Charkatz</b>      | Graystone Consulting             | Potomac, MD     | ■                          | ■                           | ■                                | ■           | ■          |                     | 8312                    | 25                        | 25            |
| 10   | N   |     | <b>James Meek</b>         | Graystone Consulting             | Baltimore, MD   |                            | ■                           | ■                                | ■           | ■          |                     | 1459                    | 32                        | 35            |
| 11   | 10  |     | <b>Peter Dunne</b>        | Merrill Lynch Wealth Mgmt        | Bethesda, MD    |                            | ■                           | ■                                | ■           | ■          |                     | 4362                    | 30                        | 40            |
| 12   | 15  |     | <b>Ann Marie Etergino</b> | RBC Wealth Mgmt                  | Chevy Chase, MD | ■                          | ■                           | ■                                | ■           | ■          |                     | 1067                    | 7                         | 15            |
| 13   | 7   |     | <b>Brett Clifford</b>     | Morgan Stanley PWM               | Baltimore, MD   |                            | ■                           | ■                                |             |            |                     | 1195                    | 20                        | 35            |
| 14   | 12  |     | <b>Gregory Baker</b>      | Merrill Lynch Wealth Mgmt        | Bethesda, MD    | ■                          | ■                           | ■                                |             |            |                     | 992                     | 3                         | 4             |
| 15   | 19  |     | <b>Jonathan Murray</b>    | UBS Financial Svcs               | Hunt Valley, MD | ■                          | ■                           | ■                                | ■           | ■          |                     | 1177                    | 1.5                       | 3             |
| 16   | 20  |     | <b>Robert Collins</b>     | Collins Investment Group         | Bethesda, MD    | ■                          | ■                           | ■                                |             |            |                     | 805                     | 2                         | 5             |
| 17   | 24  |     | <b>Peter Maller</b>       | Maller Wealth Advisors           | Hunt Valley, MD | ■                          | ■                           |                                  |             | ■          |                     | 510                     | 2.5                       | 5             |
| 18   | 23  |     | <b>Richard Wagener</b>    | Wagener-Lee / Raymond James      | Columbia, MD    | ■                          | ■                           | ■                                | ■           | ■          |                     | 712                     | 1.7                       | 3.7           |
| 19   | 14  |     | <b>Ronald Fishbein</b>    | Morgan Stanley Wealth Mgmt       | Rockville, MD   | ■                          | ■                           | ■                                |             |            |                     | 890                     | 2.5                       | 3.5           |
| 20   | N   |     | <b>Patricia Baum</b>      | RBC Wealth Mgmt                  | Annapolis, MD   |                            | ■                           | ■                                | ■           | ■          |                     | 1363                    | 2                         | 8             |
| 21   | N   |     | <b>Arun Sardana</b>       | UBS Financial Svcs               | Bethesda, MD    |                            |                             |                                  | ■           | ■          |                     | 1675                    | 44                        | 50            |
| 22   | 18  |     | <b>John Lynch</b>         | Lynch Retirement / Raymond James | Fulton, MD      | ■                          | ■                           |                                  |             |            |                     | 554                     | 1.5                       | 2             |
| 23   | N   |     | <b>Frank Dingle</b>       | RBC Wealth Mgmt                  | Baltimore, MD   | ■                          | ■                           | ■                                |             |            |                     | 794                     | 1.5                       | 3.5           |
| 24   | 17  |     | <b>Brian Kroneberger</b>  | RBC Wealth Mgmt                  | Hunt Valley, MD | ■                          | ■                           | ■                                |             | ■          |                     | 950                     | 3                         | 6             |