

CUSTOMERS													
Rank		Name	Firm	Location	Individuals (Up to \$1mil)	High Net Worth (\$1-10 mil)	Ultra- High Net Worth (\$10 mil+)	Founda- tions	Endow- ments	Institu- tional	Total Asset Account (\$mil)	Typical Account (\$mil)	Typical Net Worth (\$mil)
'15	'14												
1	2D.C.	<b>Robert Scherer</b>	Graystone Consulting	Potomac, Md.		-	-	-	-		6200	25	25
2	3	<b>Kent Pearce</b>	Merrill Lynch Wealth Mgmt	Towson, Md.		-	-	-			1144	7	20
3	5	<b>Leo Kelly</b>	HighTower	Hunt Valley, Md.		-	-	-	-		1326	5	10
4	4	<b>Greg Hurlbrink</b>	Morgan Stanley Wealth Mgmt	Baltimore, Md.		-	-	-	-		1625	5.5	15
5	2	<b>Barry Garber</b>	Deutsche Asset & Wealth Mgmt	Baltimore, Md.		-	-	-	-		2300	15	25
6	6	<b>Larry Boggs</b>	Wells Fargo Advisors	Cumberland, Md.		-	-				1144	3	5
7	7	<b>E. Geoffrey Sella</b>	SPC Financial, Inc	Rockville, Md.		-	-				640	0.68	1
<b>8</b>	<b>9</b>	<b>Joseph Jacques</b>	<b>Jacques Financial</b>	<b>Rockville, Md.</b>		-	-				<b>625</b>	<b>0.75</b>	<b>1.5</b>
9	11	<b>Neal Simon</b>	Highline Wealth Mgmt	Rockville, Md.		-	-				1336	5.6	7
10	16	<b>Peter Dunne</b>	Merrill Lynch Wealth Mgmt	Bethesda, Md.		-	-	-	-		3921	40	40
11	18	<b>Robert Collins</b>	Collins Investment Group Wells FiNet	Bethesda, Md.		-	-				750	3	6
12	12	<b>Gerald Scheinker</b>	Janney Montgomery Scott	Baltimore, Md.		-	-				973	2.75	7.5
13	14	<b>James Meek</b>	Graystone Consulting	Baltimore, Md.		-	-	-	-		1348	12.5	18
14	10	<b>Tom Hill</b>	Morgan Stanley Wealth Mgmt	Easton, Md.		-	-				1020	3	7
15	20	<b>Michael Meredith</b>	Merrill Lynch Wealth Mgmt	Baltimore, Md.		-	-				1015	3	5
16	17	<b>John Lynch</b>	Raymond James	Fulton, Md.		-	-				524	1.5	5
17	N	<b>Gregory Baker</b>	Merrill Lynch Wealth Mgmt	Bethesda, Md.		-	-				752	2	4
18	19	<b>Ronald Fishbein</b>	Morgan Stanley Wealth Mgmt	Rockville, Md.		-	-				763	2.5	4
19	21	<b>Jim Holzapfel</b>	Wells Fargo Advisors	Hagerstown, Md.		-	-	-	-		738	1.5	3.5
20	22	<b>Jonathan Murray</b>	UBS Financial Svcs	Hunt Valley, Md.		-	-				790	1.1	2.5
21	13	<b>Ross Charkatz</b>	Graystone Consulting	Potomac, Md.		-	-	-	-		6200	25	25
22	15	<b>Brian Kroneberger, Jr.</b>	RBC Wealth Mgmt	Hunt Valley, Md.		-	-				1200	2.5	4
23	N	<b>Ann Marie Etergino</b>	RBC Wealth Mgmt	Chevy Chase, Md.		-	-	-	-		731	3.5	5
24	N	<b>William Orr</b>	Merrill Lynch PBIG	Frederick, Md.		-	-	-	-		590	10	15